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ABSTRACT

Regional aspects of educational policies are discussed as they relate to member nations of the Organization for Economic Cooperation and Development (OECD). The document contains 12 technical reports which were presented at OECD meeting of national education experts in 1977. The document is presented in four sections. Section I discusses regional development strategies. Four papers focus on the Tennessee Valley Authority, educational participation in the Albury-Wodonga region of Australia, political influences in regional educational development in France, and educational trends in Swiss mountain areas. Section II examines the role of education in regional economic and cultural development. Case studies upon which reports are based include Appalachia, the United Kingdom (Coventry and the West Midlands), and France. Section III discusses regional disparities in education based on educational planning in Sweden and trends in higher education in Finland. The final section examines planning and organizational issues. Papers focus on decentralization of educational decision making in Norway, regional autonomy in educational matters in Yugoslavia, and regionalization of education in Italy. For each report, a separate table of contents and a summary are presented. (DB)

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EDUCATION
AND
REGIONAL DEVELOPMENT

L'ENSEIGNEMENT
ET LE
DEVELOPPEMENT REGIONAL

TECHNICAL REPORTS
RAPPORTS TECHNIQUES

VOLUME II

SO 012 385

ORGANISATION FOR ECONOMIC CO-OPERATION AND DEVELOPMENT
ORGANISATION DE COOPÉRATION ET DE DÉVELOPPEMENT ÉCONOMIQUES
PARIS 1979

MAR 0 4 1980

L'Organisation de Coopération et de Développement Économiques (OCDE), qui a été instituée par une Convention signée le 14 décembre 1960, à Paris, a pour objectif de promouvoir des politiques visant :

— à réaliser la plus forte expansion possible de l'économie et de l'emploi et une progression du niveau de vie dans les pays Membres, tout en maintenant la stabilité financière, et contribuer ainsi au développement de l'économie mondiale ;
— à contribuer à une saine expansion économique dans les pays Membres, ainsi que non membres, en voie de développement économique ;
— a contribuer à l'expansion du commerce mondial sur une base multilatérale et non discriminatoire, conformément aux obligations internationales.

Les Membres de l'OCDE sont : la République Fédérale d'Allemagne, l'Australie, l'Autriche, la Belgique, le Canada, le Danemark, l'Espagne, les États-Unis, la Finlande, la France, la Grèce, l'Irlande, l'Islande, l'Italie, le Japon, le Luxembourg, la Norvège, la Nouvelle-Zélande, les Pays-Bas, le Portugal, le Royaume-Uni, la Suède, la Suisse et la Turquie.

The Organisation for Economic Co-operation and Development (OECD) was set up under a Convention signed in Paris on 14th December 1960, which provides that the OECD shall promote policies designed:

— to achieve the highest sustainable economic growth and employment and a rising standard of living in Member countries, while maintaining financial stability, and thus to contribute to the development of the world economy;
— to contribute to sound economic expansion in Member as well as non-member countries in the process of economic development;
— to contribute to the expansion of world trade on a multilateral, non-discriminatory basis in accordance with international obligations.

The Members of OECD are Australia, Austria, Belgium, Canada, Denmark, Finland, France, the Federal Republic of Germany, Greece, Iceland, Ireland, Italy, Japan, Luxembourg, the Netherlands, New Zealand, Norway, Portugal, Spain, Sweden, Switzerland, Turkey, the United Kingdom and the United States.

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FOREWORD

Study of the regional aspects of education policies has resulted in the publication of an OECD Report, under the title Education and Regional Development: General Report.

In drafting this General Report, the OECD Secretariat utilised a series of Technical Reports written by national experts, analysing in some detail the problems arising, the original experiences and specific approaches to be found in the various Member countries. These Technical Reports are printed here as they were presented to a meeting of National Representatives and Experts on this subject in July 1977. They are printed in the original language in which they were submitted to the Secretariat, French or English, along with a summary in the other language.

They are presented here grouped under the four topics around which the General Report was structured; the distribution has been made on the basis of the relevance of the most original features of each report to the appropriate topic. However, most of these reports cover a wider scope, impinging on other matters and themes elaborated in the General Report.

AVANT-PROPOS

L'étude des aspects régionaux des politiques d'éducation a donné lieu à un rapport de l'OCDE, publié sous le titre L'enseignement et le développement régional - Rapport général.

Pour la préparation du Rapport général, le Secrétariat a utilisé une série de rapports techniques, rédigés par des experts nationaux, qui analysent de très près les problèmes auxquels sont confrontés divers pays Membres de l'OCDE, leurs expériences originales et leurs méthodes spécifiques. Ces rapports techniques ont été présentés lors d'une réunion de représentants nationaux et d'experts consacrée à cette activité, réunion qui s'est tenue en juillet 1977. Ils sont publiés tels qu'ils ont été soumis au Secrétariat, en anglais ou en français, et sont accompagnés d'un résumé dans l'autre langue.

Les rapports techniques ont été regroupés dans ce volume en fonction des quatre thèmes du Rapport général, compte tenu de leur orientation particulière. Toutefois, la plupart de ces rapports traitent d'autres thèmes et questions ayant une portée plus générale.

Part One

REGIONAL DEVELOPMENT STRATEGIES AND THE REGIONAL DIMENSION OF EDUCATIONAL POLICIES

Première Partie

STRATEGIES DE DEVELOPPEMENT REGIONAL ET DIMENSION REGIONALE DES POLITIQUES D'EDUCATION

Technical Report No. 1

REGIONALISM IN THE UNITED STATES: THE TENNESSEE VALLEY AUTHORITY

by
Dr. H. Case
Former Director of Personnel
and Assistant General Manager of the
Tennessee Valley Authority

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I. REGIONALISM IN THE UNITED STATES

1. Introduction

Regionalism is not a precise term; it has different meanings in different countries, or even in the same country. In the United States, because of its size, its geography, and its history, the concept is particularly ill-defined and confusing.

Throughout its history, the United States has been a physically expanding society. In the colonial and early national period, there were three more or less distinctive regions: New England, the Middle States, and the South. As settlements moved westward, a Western region, constantly growing, and embracing all territory west of the Appalachian Mountains, came to be identified. With further colonisation the vast area west of the coastal states and the Southern "border" states came to be thought of as four more or less distinguishable regions: the Mid-West, the Southwest, the Far West, and the Northwest.

The borders between these regions are far from clear-cut, and none of the regions ever obtained any political identity, with the exception that the South, which, though never recognised as such by the national government, declared itself a nation in 1861, and engaged the "North" in a war of secession; the North being that part of the nation that was not the South. The secession having failed in 1865, the southern states remained in the Union as a region probably more self-conscious than any other part of the country.

The states, of which there are now 50, are and always have been the basic units into which the U.S. is divided for political and administrative purposes; in fact the Federal Government was originally a creature of the states, which existed long before the Federal Government of the United States of America was created. However, with the adoption of the Constitution the Federal Government assumed primacy with respect to those functions assigned to it in that instrument, with all powers not so assigned being reserved to the states "and to the people". The states have their own constitutions, elect their own governors and legislatures, administer the civil and criminal laws, the school systems, road systems, health services,etc. - although in recent years the Federal Government has been encroaching into many of these areas, primarily through the power of the purse and the enforcement of the "rights of citizens of the U.S." as defined in the Constitution. But despite these encroachments the states are still primary, and whatever movements toward regionalisation in a political sense have occurred or may occur, the powers of the states have to be reckoned with. State boundaries themselves rarely correspond to any natural or cultural subdivisions which would justify referring to them as regions in any meaningful sense - though the isolated new states of Alaska and Hawaii might constitute exceptions. True, many states have primary or distinctive interests, or combinations of interests, of an economic or cultural character. Thus Massachusetts is primarily a manufacturing state, Nevada a mining state, Nebraska an agricultural state, North Carolina a tobacco state, etc. Also there are peculiarities resulting from the nature of colonisation of the various parts of the country: the New England states were colonised mainly by the English, with a subsequent heavy infusion of Irish; in the Middle States are many Dutch, German, Irish, Italians, and Poles; the South is strongly English, except for the French influence in Louisiana and the Spanish influence in Florida; Minnesota was heavily populated by Swedes and Norwegians, and Wisconsin by Germans. And of course the South's English population was supplemented by large numbers of Africans brought in as slaves.

State boundaries in many cases have been determined by the flow of rivers; but major settlements have naturally been located on these waterways, and once the rivers were bridged, an industrial "region" would spread in two or more directions and thus into two or more states; but the state boundaries stood in the way of any genuine regionalisation for political or administrative purposes. (See Section 4 below "Metropolitan Regions".)

Despite the above-mentioned and other differences between states, and between regions, however defined, the striking fact about the U.S. is the relative homogeneity of culture - homogeneity that persistently increases with the rapid progress of the communications, arts and the national proclivity for travel and transfer of work location. Possession of a single national language has been a major factor also. Thus regions, to the extent that they can be defined, tend to be identified in terms of either physical geographic divisions, such as river basins, or in terms of problem areas, notably areas of under-development.

2. Theories of Regionalism

There has been no dearth of attempts by American scholars and planners to develop a theory or philosophy of regionalism. Particularly in the decade of the 1930s, a literature on regions and regionalism flourished, in which, not surprisingly, a southern university - the University of North Carolina - played a leading role through its Institute for Research in Social Science. One of the early large-scale studies coming out of this institution was entitled *Southern Regions* (not Region), which perhaps gives a clue to the complexity of the subject. In fact the concept of region in this school grew into a veritable theory of society, and the author of *Southern Regions* says at one point that "there may therefore be, generally speaking, as many regions as there are purposes of functions (in society)". This probably represents the *reductio ad absurdum* of regional theory, and of course does not do justice to the more realistic attempts to develop a theory of regionalism. But it cannot be said that these efforts have been successful, and scholarly interest in the subject has declined. The Tennessee Valley Authority (TVA), which uniquely at the time was engaged in a successful programme of regional development, was not perceptibly affected by the efforts of scholars to rationalise the subject. Regionalism theory did however have some proponents in Washington in that decade, and the Roosevelt-created National Resources Committee published as one of its early reports *Regional Factors in National Planning and Development*. The Committee, after extensive staff studies, identified no less than eight alternative approaches which theoretically might be adopted in any effort toward American regionalisation:

i) Regions based upon metropolitan influence, of which 16 were suggested as possibilities.
ii) Regions based upon administrative convenience, which was much the same as the first, except that it contemplated 23 administrative centres.
iii) Regions based upon groups of states, of which 11 groups were identified.
iv) Regions based upon major geographical areas - essentially water systems.
v) Regions based upon the nature of the planning problems - variation of alternative (iv).
vi) Regions based upon "logical" improvement areas - an extension roughly of the TVA idea.
vii) Regions based upon the traditional concept of broad categories of interest: the East, the Middle West, the West, and the Far West.
viii) Regions based upon existing administrative districts of the Federal Departments.

The Committee of course recognised that this was a preliminary study of possible alternative directions if some kind of formal regionalisation took place in the U.S. However, the study had little, if any, influence on public policy, and except for the TVA, which actually anteceded the study, the Congress took no action toward implementing its ideas for the next 30 years.

3. Evolution of Regional Agencies

As intimated above, the Tennessee Valley Authority is the only regional Federal agency that came out of the extensive interest in the subject of regionalism in the 1930s. The TVA is discussed in some detail in Part II of this report, and we will describe it only briefly at this point. TVA is a Federal agency, corporate in form, devoted to the development of water, land, and other resources of the physical region which is the drainage basin of the Tennessee River and its tributaries. The basin encompasses parts of seven Southern states, but not the whole of any one. This was then an under-developed part of the country, a fact of some significance in part because the regional agencies that were created 30 and more years later were likewise concerned essentially with under-developed areas - though the concept of under-development has come to be interpreted rather broadly.

President Roosevelt contemplated that the TVA would be replicated in other basin areas of the country, and he and President Truman did propose creation of TVA-type authorities for the Missouri and Columbia River basin areas, but these never gained the approval of the Congress.

The TVA is a strictly Federal agency, with no formal provision in the enabling Act for participation of states in its planning or administration, although the Act directs the Board to co-operate with states and local governments, and it has done so in varying ways in different elements of its programme. All subsequently-created regional organisations involving Federal responsibilities have been in one way or another based upon compacts between the participating states and the Federal Government, with specific provisions for sharing responsibilities. The first of these was the Delaware River Basin Commission (1961), created jointly by four states and the U.S. "to encourage and provide for the planning, conservation, utilisation, development, management, and control of the water resources of the basin". However, perhaps in no small part due to the fact that the Commission overlapped existing programmes of highly developed states, not to mention Federal agencies, plus the fact that it was not empowered to add to the sum total of Federal funds coming into the region, it has not been very effective.

The Water Resources Planning Act of 1965 is another example of an effort at regionalisation centred on water resources. This Act provided for the creation of Commissions for River Basin Planning, representative of the Federal agencies having responsibilities in a specific river basin and of the states included in whole or in part in that basin. The Commissions are strictly co-ordinating bodies, with the principal emphasis on planning. They are not financed or staffed adequately to take independent initiatives, and operate essentially on a basis of consensus among the member states and the representative of the Federal government. Seven such Commissions have been created, functioning in 32 of the 50 states.

In the same year (1965) that the Commissions for River Basin Planning were established, the Congress passed two other acts relating to regionalisation: the Appalachian Regional Development Act and Title V of the Public Works and Economic Development Act creating additional (to the Appalachian Commission, that is) Commissions for Regional Economic Development. All of these Commissions, like the TVA, were to be concerned with the development of under-developed areas or regions, though their areas of jurisdiction were less clearly defined than those of the river basin commissions.

Since the Appalachian Regional Commission is discussed in some detail in Technical Report No. 5, and since the other Commissions - of which there are at present seven - are in general modelled after the Appalachian Commission, it is necessary here only to mention their principal distinguishing characteristics:

i) As mentioned above, they are concerned with under-developed areas in a series of contiguous states, which under-developed areas have sufficient common problems to constitute a "region" within the meaning of the Acts.

ii) They provide for formal co-operative relationships between the states of such region and the Federal government. A major object has been to strengthen, but in no way to supplant the responsibilities and capacities of the state governments in social and economic development. The emphasis is on planning, but the stronger commissions have considerable influence upon the states and the Federal agencies in the execution of programmes.

iii) To a considerable extent they came into being out of pragmatic considerations and not out of any systematic theory of regionalism. They are in response, to some extent, to the failures of both state and Federal agencies in social and economic development planning and administration. Practically all, if not all of the programmes in which they are engaged, fall under the jurisdiction of existing agencies, both state and Federal. These responsibilities and powers have not been altered by creation of the regional commissions; but the regional commissions are expected to facilitate co-ordination of existing agencies, and to introduce some initiatives and imagination into the established departments. The infusion of some additional Federal funds beyond customary budgets has been an important factor in accomplishing some of these objectives, and perhaps such successes as they have had have been proportional to the amount of such additional funds. Nevertheless, the absolute amount of such supplementary funds has generally been small in relation to the total Federal and state funds for these programmes.

iv) Though statutory, the commissions are temporary agencies, authorised only for short life spans - though these can be, and have been, extended.

Although the states continue to be the key points for administration of these regional programmes, Federal leadership has been decisive in keeping them alive. This leadership has come largely not from the executive branch, but from the Congress, primarily through the Senate Committee on Public Works. After nearly ten years of experience with the commissions, the Senate Committee introduced and pushed through the Congress rather extensive amendments to the Appalachian Regional Development Act and the Public Works and Economic Development Act to reveal some of the weaknesses in the programmes that had become apparent. We will summarise the principal features of these amendments here, since they throw light both on what the commissions have been, and what they may be expected to be in the future:

- To reassert and strengthen the concept of the commissions to "be a creative resource providing fresh ideas and programme innovations for the regions' problems...(to be) a problem solving mechanism that sets an example of a better way of conducting the people's business". Thus the demonstration rather than the executive role of the commissions is emphasised.
- To authorise increases in the amounts of Federal funds going into the regional programmes.
- To require more active participation of the state governors personally in the work of the commissions.
- To require the commissions to prepare Regional Development Plans for their respective regions, based upon state development plans of the member states.
- To require the commissions to obtain effective participation of local units of government and citizen groups in their planning.

It is of course too early to judge what effects these amendments to the charters of the commissions will have on the programmes and accomplishments of the commissions. However, it is clear that it is the intention of the Senate Committee, and presumably of the Congress which approved the amendments, that these regional commissions will become, at least for a limited period, vital forces in American public administration.

4. Metropolitan Regions

An approach to the concept of regions quite different from the above arises from the fact that the major centres of population and of economic activity at the present time are in and around the great cities. As of 1970, over 40 per cent of the population of the country lived in thirty-five major metropolitan areas of a million or more population, as defined by the U.S. Bureau of Census. The majority of these cut across state lines, and encompass numerous county governments, and an even larger number of local government districts set up to provide services such as education, water supply, sewage disposal, health, etc. Presumably following the lead of the Census Bureau, these agglomerations were never referred to as regions until quite recently, but as metropolitan areas; however, in the past ten years they have increasingly been referred to as regions in the rapidly growing literature on the subject.

With a few exceptions, no political organisation has come into being which could properly be called a metropolitan regional organisation, and none in the largest metropolitan areas. For many years students of urban problems tended to assume that in the long run the interdependence of the problems of government and economics of the "inner city" and the surrounding suburban and outlying areas, would lead to creation of genuinely regional political units for these metropolises, but this does not seem to be happening. The powerful demand in the United States for localism in the management of matters which come closest to home, such as schools, police protection, utilities, etc. works against such a development; and vested interests in existing political organisations have solidified these dispositions into seemingly immortal patterns of government. It now appears that such integration of governmental bodies within the metropolis as are necessary and inevitable will come, as they already have done in many cities, in the form of pragmatic arrangements among political units for exchange of services rather than any genuine metropolitan regionalisation. There is, apparently, no sense of community among the disparate population groups which constitute the so-called metropolitan region. Perhaps a major financial or natural calamity might change this.

5. Interstate Compacts

The regional agencies described previously represent co-operative relationships between several states on the one hand and the Federal government on the other. There are also many "interstate compacts"

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among two or more states to deal with common problems of adjoining states in which the Federal role is simply that of approval of the compact, as required by the U.S. Constitution. Such compacts may in fact be initiated with the primary or secondary object of keeping the Federal government out of matters which are conceived as only of local concern. Well over a hundred such compacts have been negotiated and approved. Examples - the functions of which are suggested by the titles of the agencies created to administer them - are: the Interstate Oil Compact Commission, the Atlantic States Marine Fisheries Commission, the Ohio River Water Sanitation Commission, and the Port of New York Authority (bridges, tunnels, airports, etc.). Some compacts, e.g. the Bi-State Development Agency, governing development of the St. Louis Metropolitan Region, deal with the problems of metropolitan government discussed above.

It will be seen that these interstate agreements are designed to handle specific problems which cut across state lines but in which no clear-cut national interest may in fact exist, or in which a national interest could be identified but the local public and private interests wish to forestall Federal intervention. These are, no doubt, regional agencies, though not based on any comprehensive scheme or philosophy of regionalism.

6. Regional Associations

There are inevitably, given the American passion for creating organisations on the slightest provocation, a vast number of private associations which are strictly regional, or regional subdivisions of national associations. The number of these runs into the hundreds, but they do not come within the scope of the present report.

7. Applications to Education

Even a hasty review of the above brief review of regionalism in the United States would make clear that regionalism concepts have little influence on education in this country. Perhaps even more than other fields of public service, education has been from the beginning, and remains, a matter in which the local community is jealous of its rights and its responsibilities. Above the local community, in education the states have pre-eminent authority and responsibility. The Federal government in fact has no specific constitutional responsibility for education.

Regional co-operation among states, however, has taken place to a significant extent in the field of higher education in three regions - the South, New England, and the West. Since the Southern Regional Education Board (SREB) was the first of these regional organisations to be created and blazed the trail for the others, we will give a brief description of that agency. The southern regional movement in higher education was facilitated by the fact that regional sentiments have been stronger in the South, and that, having fewer developed resources, the South had a more compelling need for co-operation across state lines.

The SREB is based upon an interstate compact among sixteen southern states, in which the Federal Government has no role. It is essentially a creature of the Southern Governors' Conference, which dates from 1934. Under the compact, which required the formal approval of the governors and legislatures of all participating states, the Board is granted the power "to enter into such agreements or arrangements with any of the states and with educational institutions or agencies, as may be required in the judgement of the Board, to provide adequate services and faculties for graduate, professional and technical education for the benefit of the citizens of the respective states". The guiding idea has been that a higher standard and broader reach of higher education could be made available to the citizens of the member states by co-operation, rather than by uncontrolled competition. Thus instead of setting up, for example, sixteen Colleges of Veterinary Medicine in the sixteen states, it would make sense to have only three or four institutions in the region which would provide advanced education in this field. The other twelve states, through the co-ordinating role of the Board, would provide financial support for the four, based on the number of students which a state sent to the four institutions. Such funds can only be used for operating and maintenance expenses, however, and not for expansion of the educational plant, which remains a state (or private) responsibility.

The Board has no power to prevent any state from establishing its own institution, but the obvious economies in co-operative effort have been sufficiently persuasive to make the co-operative programme highly successful to date - though it is entirely possible that in the course of time, with increasing demand, all or most participating states would find it feasible or necessary (politically if not otherwise) to have their own institutions.

With the increasing specialisation in all fields of higher education, a different kind of co-operative effort has been found desirable - that of institutional specialisation within a broad professional or technical field, so that a student's selection of an institution for advanced study would depend upon his specialised interests. To facilitate this, the Board has provided for inter-institutional agreements, worked out by the membership of the respective professions among the educational institutions of the region. This has led to systematic consultations and agreements on curriculum, standards of admission, and related matters.

The Board has encouraged and assisted the colleges and universities of the region to undertake self-evaluation of their respective programmes, so that they may judge for themselves the directions in which they ought to develop, in the light of the needs of their states and the region as a whole. Thus in a very real sense it may be said that the Southern states have developed a genuine regional approach to higher education - always remembering, however, that the individual states retain the power of decision in every case. The Board makes no effort to evaluate, itself, the educational programmes of individual institutions or states. But the Board, being constituted of the governors of the states, and representatives of the state legislatures and of the state and private colleges and universities, carries considerable influence with public policy. It is supported by a highly qualified professional staff (financed by all of the member states). The Board and staff are also influential with the private philanthropic institutions and with Federal sources of finance and with private industry. All of these are highly significant in the financing of the extraordinarily expensive American system of higher education.

The original concept was that the Board itself would operate some regional institutions, or foster the development of "centers of excellence" operated by one or another state. However, these ideas have been judged to go beyond the limits of established doctrine about states' rights, and have not been, and probably will not be adopted. The Board, nevertheless, has considerable influence in encouraging the development of quality programmes in fields accepted for co-operative programmes, and in discouraging the establishment of programmes that do not appear to reflect regional needs, as determined by Board studies of manpower demand and educational resources. Its studies cover a wide range of subjects relating to the present and future needs for technical and professional manpower in the region and on methods for meeting these needs through higher education. The Board's staff is assisted by a regional Advisory Committee on Research in Higher Education.

The New England Board of Education and the Western Interstate Compact for Higher Education, though differing in some details from the SREB, are in general similar to the latter. Other instances of a regional element in education are largely outside government. Thus the function of accreditation of institutions of higher learning, in the interest of maintaining standards for such institutions, many of which are small private colleges, is performed by regional professional associations.

II. THE TENNESSEE VALLEY AUTHORITY (TVA)

1. Evolution of TVA as a Regional Agency

Although created in the early days of Roosevelt's New Deal and generally identified as a New Deal agency, the TVA had a long period of gestation dating back at least to World War I, when the U.S. government built a dam and power-generating facility at Muscle Shoals in northern Alabama, named Wilson Dam after President Woodrow Wilson. This dam thus became the first in the series of dams which ultimately became the comprehensive water control programme of the TVA; but the government's purpose in building Wilson Dam was primarily that of supplying power for a nitrate plant for munitions manufacture which the government also built and operated during the war.

In the years between 1918 and 1933 there was much discussion in the Congress and various proposals were put forward as to what to do with this government-owned facility, which was somewhat of an embarrassment in the dominant private enterprise philosophy of that period. It could not be given away, and no satisfactory arrangement could be worked out for selling it - though at one time it appeared that Henry Ford might take it off the government's hands.

The Tennessee River had been in the consciousness of the people of the region well before the construction of Wilson Dam, both as a source of periodic flooding and as a potential for navigation if the various shoals could be eliminated. Private power companies had also been aware of the river's potential for hydro-generation, but the power companies had been very bearish about the power needs of this region, and had built only a few small plants on the tributaries in the eastern part of the region.

In 1933, the Tennessee Valley was an underdeveloped region of the United States, with a per capita income of less than half the national average, and a population that was more than 50 per cent rural, engaged largely in row-crop farming on worn-out soils.

These various factors - government ownership of the Wilson Dam and nitrate plant; the peculiar problems and potentialities of the Tennessee River; the economic backwardness of the region, when looked at in the climate of innovation and experimentation of the New Deal, under the leadership of a few imaginative statesmen from the region and of Senator Morris of the mid-western farming state of Nebraska, provided the setting in which the TVA was conceived, culminating in the passing of the TVA Act in May 1933. The purposes of the Act are succinctly stated in its preamble:

"To improve the navigability and to provide for the flood control of the Tennessee River; to provide for reforestation and the proper use of marginal lands in the Tennessee Valley; to provide for agricultural and industrial development of the valley; to provide for the national defense by the creation of a corporation for the operation of government properties at and near Muscle Shoals in the state of Alabama."

Nowhere in the Act is the Tennessee River basin referred to as a "region". The Act refers to "the Tennessee Valley", and to "the Tennessee basin and adjoining territory". In fact, the Tennessee Valley did not then, and does not now, constitute a region in a cultural, but only in a geographic sense. It is a part of what has been referred to in the first part of this monograph as the South, but the eastern parts of the Valley are not strictly southern; in fact some of these areas fought on the side of the Union in the Civil War. The state of Tennessee itself, which is more than 600 miles in length from its eastern to its western tip, is commonly thought of as three regions: East Tennessee, Middle Tennessee, and West Tennessee. Although Middle and West Tennessee are properly southern, they are noticeably different from each other as well as, to a somewhat greater extent, from East Tennessee. The eastern part of the Valley in fact became a part of the Appalachian Region when the Appalachian Regional Development Act was adopted in 1965, though remaining, of course, a part of the Tennessee Valley and under the jurisdiction, to use the term loosely, of TVA.

Nevertheless, TVA came to be thought of, and to describe itself as, a regional development agency, as that flexible term has come into general use. The TVA was not given any specific responsibility for regional planning in the Act; however the Act assigned a general responsibility to the President for making "surveys and plans for the Valley", and by executive order President Roosevelt delegated this responsibility to TVA. But the first Board of Directors (more specifically, a majority of the Board) were of a pragmatic disposition and the TVA did not undertake then, nor has it undertaken since, to develop any comprehensive plan for the economic and social development of the region in the sense that the terms regional or national planning are now used. Some of those who subscribe to this type of comprehensive long-range planning have expressed disappointment with TVA on these grounds. Possibly the fact that the Act itself did not call upon TVA to undertake such planning was a factor in its not doing so.

2. Regional Development

Despite the fact that TVA did not develop any "blueprint" for the development of the Valley, there would certainly be few who are at all familiar with TVA's accomplishments over the forty-some years of its life who would not credit TVA with substantial contributions to development of the Tennessee Valley region. A few statistics will perhaps give an idea of the development that has taken place in the Valley over this period:

- In 1933 average income per resident in the region was 45 per cent of the national average; in 1975 it was 76 per cent, and was more than 20 times the level of 1933.
- In 1930 over 50 per cent of employed persons were employed in agriculture; in 1970, less than ten per cent.
- Annual sales of farm products, despite the great reduction in farm population, increased from an average of $400 per farm to $10,000 per farm.
- In 1933, the Tennessee River carried approximately a million tons of freight, mostly local shipments; in 1973 the river carried some 29 million tons, mostly in inter-regional traffic, on the 21-state waterway that connects with the Tennessee, and through trans-shipment at ocean ports on international traffic to Europe, Africa, and the Far East.
- The region's forests contained in 1975 nearly twice as much marketable wood as they did in 1936.
- Electricity consumption in the power service area increased from about 1 1/2 billion kilowatts per year to over 100 billion.
- Recreational facilities on the lakeshores have grown from practically zero to include over a hundred state and local parks, 340 commercial recreation areas and some 500 lake access areas.

3. TVA's Approach to Development

These and other accomplishments have come about largely through the pragmatic approach of identifying problems which seemed to stand in the way of development, and then marshalling the resources, wherever they might be found, to deal with these problems.

Water. The first and central problem was the river itself; how to control the damaging floods, while at the same time eliminating the shoals and other barriers to navigation and providing the maximum possible generation of hydroelectric power. These were primarily engineering problems, necessitating development of a water control plan for the entire river system, the fifth largest in the United States, which would most effectively balance the interests of flood control, navigation and power. The answer came in the form of a plan calling for the construction of a series of multi-purpose dams on the main river and a series of storage dams on the tributaries, each equipped with power-generating facilities. This task was assigned to the Chief Engineer, who was also assigned the continuing responsibility for controlling the flow of water in the entire system on a day-to-day basis to get the maximum use of each litre of water that falls upon the Tennessee Valley. By decision of the Board, all design and construction of dams and appurtenances was to be done by the TVA's own staff. All of this required the assembly of an exceptionally large and competent engineering organisation. This has been declared by many leading engineers as the finest engineering organisation ever put together in the country.

With completion of the multi-purpose system, flooding of the Tennessee and Ohio Rivers has been substantially reduced, though it has not been possible to eliminate them entirely; a nine-foot navigation channel has been put into operation over a distance of 650 miles on the main river; and a total hydroelectric capacity of approximately five million kilowatts has been installed.

Creation of the extensive system of reservoirs introduced a new problem - malaria - which had been endemic in the Valley but which could become a major public health problem with creation of large bodies of relatively still waters suitable for breeding of the malaria-bearing mosquito (anopheles quadrimaculatus). This problem, though initially dealt with through spraying insecticides by air, house screening, and public education, became primarily a function of water regulation, when it was discovered that minor fluctuations of water levels of the reservoirs stranded and killed the anopheles larvae.

Land. The second major problem was the land, much of which in the Valley had become "worn out" through generations of row crop farming. Yields were far below those being achieved in the more progressive agricultural sections of the country. With the heavy rainfall of the region, erosion had become a major problem, especially in the hillier parts of the Valley. Erosion was not only disastrous to farmers, but would mean an unacceptable rate of sedimentation of the newly-created reservoirs, with fatal consequences for the entire water control programme.

The approach to the land problem was totally different from that adopted for water control. As has been stated, water control was a problem that required central planning and administration. But land, in the possession of hundreds of thousands of small- and medium-size landholders, could be sensibly dealt with, consistent with the American tradition, only through education of the landholders in better methods of agriculture and land conservation. Here TVA had the great asset of the nitrate plant at Muscle Shoals, so that it was in a position to manufacture fertilizers to be used in demonstrations of better agricultural practices. TVA's agricultural and chemical engineering staff early concluded that nitrates were not the answer, and shifted the emphasis at Muscle Shoals to experimentation and subsequently to large-scale manufacture of phosphate and other soil-building fertilizers as more effective for land restoration.

The administrative machinery for reaching the farmers already existed in the form of the Federal-state agricultural extension system, organised under the state agricultural colleges and financed in part through the U.S. Department of Agriculture. The state agricultural colleges have county agents in each of the states' counties (there are 95 counties in Tennessee, for example) and it is the function of these county agents to channel information about improving agricultural practices to the farmers of the state. Rather than create its own extension organisation, TVA associated itself, through formal agreements,with the state extension systems. The major contribution of TVA was in the form of laboratory research on improved fertilizers, pilot-scale manufacture of fertilizers, and then manufacture on a sufficiently large scale to permit field application by farmers themselves of promising fertilizer innovations. TVA also provided funds to selected counties for the employment of additional county agents on their staffs to assist in the launching of test-demonstrations of improved practices by "test-demonstration farmers" who were willing to take a chance on changing traditional practices. These test-demonstration farmers then became in effect the teachers of neighbouring farmers who in their own good time became persuaded, by observation of actual results on the demonstrators' farms, that the new methods were an improvement over the old. This is of course not education in the school sense, but in a broader sense no doubt represents TVA's most significant educational effort. Better harvests, better land use, and a generally more progressive spirit gradually manifested themselves among the farmers of the Valley.

The philosophy of the forestry programme has similarly been that of education of farmers on the advantages of planting trees on the more hilly, eroded areas of their land, with the object of reducing erosion and at the same time producing a tree crop of some economic value. It was not long before a major forest products industry had developed in the eastern part of the Valley, where the heavy rainfall and warm climate are favourable to the production of fast-growing trees.

Power. A third major problem of the Tennessee Valley was the relatively low stage of industrial development, due to various factors: the small size of the market, the lack of a trained manpower supply, and discriminatory freight rates against the south in the national rate schedules being probably the most important. Creation of the navigable channel would partially alleviate the freight rate problem, but TVA also took the initiative in bringing the discriminatory rates to public attention and ultimately forcing federal action toward equalisation. By bringing a large engineering and construction organisation into the Valley, along with skilled personnel in many other fields, TVA made a major contribution to the manpower resource problem. However, no doubt the major contributing factor in industrialisation was the development of a greatly increased power supply, and the decision of the Board to adopt a power rate schedule of rates substantially below that then existing in the Valley, and in fact below rates prevailing in the country at large.

The low-rate power policy was equally designed to bring low-cost electricity to the rural population, which in 1933 constituted well over half of the Valley population. But rather than undertaking the distribution of its power to rural customers, TVA fostered the creation of local electricity distribution co-operatives, which, subject to certain controls in the contracts with TVA, rapidly succeeded in electrifying virtually the entire Valley. Similarly, power distribution in urban areas is handled by municipal power boards which contract with TVA for their power supply. Only in the case of large industrial users does TVA have direct contact with the consumer.

After extensive litigation TVA purchased the existing power facilities of the private companies and became the sole provider of power for the region.

TVA's power system expanded tremendously to meet the needs of power for arming for World War II. Aluminium manufacture for airplanes required large amounts of power, and the processing of uranium for manufacture of the atomic bomb even larger amounts. TVA had demonstrated its capacity for rapid and competent development of a power system; the Tennessee Valley was far enough inland, behind the Adirondack Mountains, to be relatively secure; and TVA was, after all, a government agency in whose creation national defense had been an important consideration. The demands soon exceeded the total hydroelectric potential, and so the Authority began to move into thermal generation. In contrast with the 60,000 kilowatt capacity of the first dam, TVA found itself building coal burning steam plants of capacities of a million kilowatts and above. In the past few years it began to build and operate nuclear plants also. The present total capacity of over 40 million kilowatts constitutes the largest single power-generating system in the United States.

In order to finance this vast system the Congress has authorised TVA not only to use its revenues for capital construction but to sell bonds against the assets of the system. The present annual budget of the Authority for power is approximately a billion dollars. There are those who complain that the power tail now wags the regional development dog. To some extent this may be true; yet many of the problems of 1933 have been substantially solved. Moreover an examination of the present programme reveals a continuing alertness to emerging new problems to whose solution a flexible and well-staffed organisation such as TVA can make and is making important contributions.

Recreation. An unanticipated but, as it turned out, important by-product of creation of the reservoirs has been the use of the many hundreds of thousand acres of lakes for recreational purposes, especially fishing, swimming and boating. TVA developed no large-scale recreation programme as such, but by making access to the lakes possible at strategic points it made possible the development by private entrepreneurs of numerous docks, boat rental services, restaurants, etc., which have served millions of citizens from the entire nation.

With the rapid growth of national interest in recreation and in the natural environment, the Congress accepted in 1963 a TVA plan to develop a large-scale recreation demonstration project in an undeveloped wooded area lying between the TVA Kentucky Lake and the Barkeley Lake constructed by the U.S. Corps of Engineers. This area, of over 300 square miles and identified as the Land between the Lakes, has been purchased by TVA to be devoted entirely to recreation, nature study, and environmental education. Public campgrounds, and facilities for picknicking, boating, swimming, fishing, hunting, hiking, riding and water-skiing are being made available to the some 50 million Americans who live within a day's drive by automobile. Although the whole project is conceived as having educational objectives, specific attention to education is provided in the Environmental Education Center, under the direction of TVA staff specialists. The Center operates the Youth Station, where facilities and staff supervision provide the opportunity for organised student groups to undertake outdoor studies.

4. Local Area Development

Following completion of the major dam construction, the programme turned its attention to the flood control problems of the small tributary streams. These are matters mainly for local initiative and execution, and the contribution of TVA has been in the form of providing assistance to local communities and farmer groups in developing their own local flood control programmes of channel clearance, small dam construction and community land use. Although this programme was originally concerned with flood control, experience with local communities and groups has led to a wider interest in the needs of small communities for technical assistance in a variety of problems, and TVA has become involved in such matters as local health services, disposal of solid wastes (a major problem in the American high consumption society), rural fire protection, cash programmes for rural youth, and others. Such services came into being through the availability of a small, flexible and imaginative staff such as TVA has assembled, but do not imply that the Authority is or will be taking over the responsibilities of state and local governments in such areas. The TVA objective continues to be to encourage and assist established agencies or the creation of new agencies which will take responsibility for continuing exercise of functions which are and ought to be local, not federal. As has been said earlier, regional agencies are effective partly as a consequence of not being parts of established bureaucracies. If they become bureaucracies themselves, this asset is likely to be lost.

5. Distinguishing Features of TVA

The preceding brief account gives an overall view of the principal programmes which TVA developed to deal with what appeared to be the major barriers to economic and social development in the Tennessee Valley. We now turn to the distinguishing characteristics of the agency - the factors which largely account for the TVA's successes, as well as the limitations within which it operates.

Probably the most important fact about TVA is that it represents a well conceived scheme of decentralisation of Federal powers - to be sure, within specified and by no means the full range of Federal activities, as will be discussed below. But within the area of its competence, the Authority was given by the Congress powers commensurate with the responsibilities assigned to it. The original Board, and all subsequent Boards have fought, with remarkable success against recurring attacks from many directions, to live up to the spirit of this intent of Congress. The Act declared that the headquarters of the Authority should be in the region which it served, and one of the first acts of the Board was to establish itself in the Valley - not only in a formal corporate sense but as the actual homes of the full-time Directors, and the meeting place for meetings of the Board. Complementarily, only a liaison office of two professional persons, later reduced to one, was established in Washington. The location of the Board was not only symbolically significant; it meant that for the most part the people the Directors talked with, the persons whom they addressed in public appearances, and the newspapers that they read were people or institutions of the region, and not politicians and bureaucrats in Washington.

Being entrusted with broad responsibilities itself, the Board was in a position to and in fact did adopt a policy of maximum delegation of responsibility and power throughout the organisation, which meant that professional staff were enabled to work with local institutions and citizens on a responsible basis, without excessive checking with superiors at headquarters and without being subject to regulations and controls which would impair their initiative and decision-making. This policy of trust of subordinates has been one of the distinguishing features of TVA throughout its history, and goes a long way toward explaining the high morale of its employees which has been almost universally commented upon by students of and visitors to the Authority.

Secondly, TVA is (subject to the problems of definition of terms previously discussed) a genuine regional Federal agency, the first such in the United States. The region is clearly defined, in terms of physical geographic features, though not in a cultural or political or administrative sense. It is regional in that it operates within neither national nor state boundaries; yet it is strictly Federal, in a sense not true of subsequently created regional agencies in the United States - that is, the states have no formal participation in the programme. Whatever relationships have been developed with state governments and their subordinate governments and institutions (and they have in fact been numerous) have been at the discretion of the Board, and have not involved state functionaries in any decisions of the Board, except in the negotiation of contracts and agreements between the states and TVA.

Thirdly, TVA is a multi-functional agency with respect to development. The Federal government naturally has created a great variety of development programmes over the years, but these have consistently been either unifunctional, or limited to specified development activities: agriculture, forestry, flood control, etc., each assigned administratively to a department or other agency of the Federal government. Only in recent years, as mentioned in Part I of this report, has any effort been made to co-ordinate these development programmes, and even so, the primary Federal responsibility has been continued in the Federal departments. TVA, in contrast, was assigned responsibility for an integrated development programme, and it became the responsibility of the Board to relate the parts to the whole. This does not mean, however, that TVA superseded Federal development programmes in the Valley (except that the Authority did take over the flood control and some of the navigation functions of the Corps of Engineers). But these programmes had been ineffective for various reasons in various ways, and it was relatively easy for a dynamic new agency with flexible powers to develop new programmes without too seriously confronting the orthodox departments. Moreover, TVA was able to work out co-operative relationships with most of the departments in the field, as long as formal jurisdictional disputes could be avoided in Washington. Nevertheless, the departments, not surprisingly, have normally viewed TVA with some suspicion, or even alarm.

Fourthly, TVA is a public corporation, empowered with the freedom of action in management which private corporations have in the

United States. Of cardinal importance is its exemption from the jurisdiction of the Civil Service Commission, under which exemption it has developed its own system of personnel administration adapted to its own needs. The Act places upon the Board full responsibility for applying the principle of merit and efficiency in all appointments and other personnel actions, under penalty of dismissal of a Director who is guilty of violation, but without all of the checks, balances, regulations and delays of the formal Civil Service. This policy has been rigidly adhered to, to the dismay, at times, of the political parties. A distinguishing feature of the personnel policy adopted is that of negotiation with unions on matters of wages and working conditions, and co-operative relationships with the unions on employee training, job classification, improvements in the efficiency of the service, and other matters which had traditionally been considered the prerogatives of the "sovereign state" (which meant the management) in the Federal service.

Other areas in which TVA enjoys management independence, which are customarily controlled by specialised staff agencies in the Federal service, are procurement, including land acquisition, law, accounting and auditing and office management. Under these grants of authority by the Congress, TVA has succeeded in developing the concept that specialised staff agencies exist to assist management in getting its job done, rather than to control them against wrongdoing, the traditional rationale of such services in government.

The above represent probably the principal characteristics of TVA which account for its undoubted accomplishments. It must be made clear, however, that the Authority is not the all-powerful autonomous organisation which is sometimes supposed. Like other arms of the Federal government it must submit an annual budget to the President through his Bureau of the Budget. This budget requires the approval of the Congress, following hearings in both houses. The General Accounting Office may, and frequently has, taken exception to TVA expenditures, and has expressed its views on programme and policy. That these processes have not for the most part materially slowed or stopped the successful prosecution of the programme, even where substantial opposition has developed, is primarily a reflection of two facts: (i) the highly competent performance of the Board and staff, which have generally been able to demonstrate justification for the actions that have been proposed or taken; and (ii) the fact that TVA has always had a few strong friends in the Congress, usually but not always from the Valley states, who have been spokesmen for the Authority in the halls of Congress - a pre-condition for the long-term survival of any Federal agency in the United States. TVA has never been without enemies, notably the private power companies, parts of the Federal bureaucracy, and the more conservative elements in the Republican party. It has survived constitutional and other legal battles which have gone as far as the Supreme Court: critics who think that it is too socialistic and critics who think that it is too conservative; a personal and policy crisis in the first Board which resulted in Presidential intervention; an unfriendly administration in Washington for eight years; and a full-scale Congressional investigation. Without solid performance, and a few stalwart friends in Congress, it would have been dead years ago.

6. What TVA Is Not

In order to present a rounded picture of TVA, it is now necessary to make clear some of the things that it is not. It has no statutory or delegated responsibility in most of the areas in which government operates. It has no responsibility for education, for public health or social welfare or highway or street construction or maintenance. It has no police powers. All of these are state responsibilities - although in recent years there has been increasing participation of the Federal government, especially in the form of financial support and attendant controls of specific programmes. True, the Authority has made some contribution in most of these fields where ancillary to its delegated development functions. But these have all been incidental and do not alter the fact that TVA had no general responsibilities in these fields.

Furthermore, despite its probably justified claim that it is closer to the people than most Federal agencies, by virtue of having its Board and staff located entirely in the region, it is not "democratic" in the sense that the public has any direct way of participating in its decision-making. No member of the Board is elected by the people of the Valley. There is no regional advisory body either politically selected or selected by citizen groups. Neither the governors of the states, nor other state officers, have any role in the policy or administrative decisions of the Authority, in which respect it differs from the other regional agencies which have been subsequently created by the Congress.

Whether anything would have been gained by incorporating such arrangements in the TVA Act it is impossible to judge with confidence. The fact that there has never been any political or public demand for that kind of participation seems to suggest that the people of the Valley have been generally satisfied with the results of the programme, and have not felt the need for more direct involvement. This could of course change if it were thought that the Authority was becoming insensitive to the interests of the public.

7. TVA and Education

It must be apparent to the reader by this time, if we limit our definition of education to formal schooling, that TVA is of minimal importance to the subject of regionalism in education. If, however, we define education in the broader sense of learning systems, both formal and informal, the picture is quite different. For TVA has in many respects taken an educational approach to its job. The agriculture programme, as has been pointed out, except for the research and manufacturing functions of the Chemical Engineering plant, has been almost entirely one of educating farmers in the use of new fertilizers and new methods of soil conservation and improvement. And this has been carried out through educational institutions - the Extension Services and Experiment Stations of the state agricultural colleges. The principal educators have been the county agents who work directly with farmers, and the demonstration farmers themselves, who have been the teachers, by example, of their neighbours. TVA itself has operated no farms, nor exercised any kind of governmental control of the farmers of the Valley, but it has had a substantial influence on their lives through educational methods. It is true that the formal school systems at the primary and secondary levels might have been made partners in this programme, but for the most part this has not been done. However, it should be pointed out that rural youth are parties to agricultural programmes in the United States through their out-of-school organisations sponsored by the Extension Services, notably the Future Farmers of America and the Four-H Clubs. TVA did undertake at one time in its early years to develop an instructional materials programme with the object of making its technical knowledge widely available to educational institutions, but this idea was never developed to its full potential. The fear of governmental interference in local school systems is a very real one in the United States and perhaps too TVA was sensitive to the fact that the private power companies had been guilty of seeking to influence school curricula in the interests of the private companies.

The Authority has also been heavily engaged in "non-formal" education within the agency itself, i.e. the education of its workers, the numbers of which have been very large, due to the fact primarily that the construction programme, amounting to hundreds of millions of dollars over the years, has been carried out by its own employees. It has been estimated that over half a million men (very few women) have worked on TVA construction and reservoir clearance projects, acquiring in the process new skills in organised group work as well as specific skills in the 15 or so crafts involved on large construction projects. Large numbers of these have gone through the four-year apprenticeship programme developed in co-operation with the trade unions. Most of these men have gone on into other employment as the Valley has become industrialised. The temporary construction villages have also provided training programmes, in addition to apprenticeship, in the upgrading of skills and in non-job related subjects. All construction villages have been provided with libraries under the technical supervision of TVA's Chief Librarian.

It is, therefore, no exaggeration to state that the construction programme has been a major adult education institution for the Valley, though of course not designed for this purpose. This is true also, though on a considerably smaller scale, of the power operations and fertilizer manufacturing programmes. For the most part, the Authority has had to develop its own operators for these systems, which it has done through formal union-management training programmes similar in principle to the craft training programmes. Unlike the construction programme, however, most of these trainees have become permanent employees of the Authority. Similarly, extensive training opportunities have been provided for the white-collar employees; thus, for example, at one time the "curriculum" available to employees in Knoxville, the headquarters, amounted to some 40 courses, mostly given in co-operation with the University of Tennessee.

But perhaps more important than formal training programmes has been the administrative philosophy of the Authority: that good administration is in fact largely a matter of developing competent subordinates; that the good supervisor is he who is concerned with the development of his people through the assignment of responsibilities and through assistance in the perfection of skills. If this theory is correct, then students of both education and of administration would do well to recognise that employing institutions, whether public or private, may be the most important educational institutions which a society possesses.

Résumé du rapport technique n° 1

LA REGIONALISATION AUX ETATS-UNIS : L'OFFICE DE LA VALLEE DU TENNESSEE

(Tennessee Valley Authority)

par

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Ce document comporte deux parties : d'une part, une discussion de la notion de régionalisation (et de régionalisme) aux Etats-Unis ; d'autre part, un exposé du projet de la Vallée du Tennessee et des activités de l'Office, notamment dans le domaine de l'éducation.

LA REGIONALISATION AUX ETATS-UNIS

En dépit du vif intérêt qu'a suscité ce sujet depuis près de 40 années, la régionalisation n'a pas eu l'influence que l'on aurait pu attendre, compte tenu de la dimension du pays. De nombreuses raisons peuvent expliquer ce paradoxe. Tout d'abord, la notion même de régionalisation est de toute évidence assez vague. Par exemple, le Comité des Ressources nationales, créé par Roosevelt, n'identifiait pas moins de huit approches possibles pouvant être théoriquement adoptées en vue de promouvoir le développement régional. De plus, l'organisation politique va à l'encontre de la régionalisation : chaque état possède sa propre constitution, élit ses gouverneurs, représentants, administrateurs civils et juges, et les frontières des états sont un obstacle politique et administratif à toute approche de régionalisation. De même, la relative uniformité culturelle des états ne favorise pas le régionalisme. Toutefois, plusieurs tentatives de planification régionale ont été entreprises, notamment en matière de ressources naturelles et de développement de zones en dépression. L'Office de la Vallée du Tennessee (TVA) en est l'exemple le plus marquant. Il s'agit d'un organisme fédéral chargé de promouvoir le développement des ressources naturelles de la zone géographique qu'est le bassin fluvial du Tennessee et de ses affluents. Cette zone couvre sept états du Sud et constitue dans son ensemble une aire sous-développée du pays. Sept autres organismes d'aménagement des bassins fluviaux ont ensuite été créés ; ils couvrent 32 des 50 états mais ne sont pas aussi indépendants vis-à-vis des collectivités locales et de l'état que ne l'est la TVA. De plus, 7 commissions régionales - dont la Commission régionale des Appalaches - ont été constituées en vue de promouvoir le développement de zones en dépression couvrant plusieurs états. Ces commissions facilitent une coopération entre ces états et le gouvernement fédéral. Elles coordonnent les actions des divers organismes existants et conduisent des actions novatrices ou de caractère expérimental au sein des administrations traditionnelles, sans pour autant se substituer aux gouvernements des états pour promouvoir le développement économique et social de ces zones.

L'auteur souligne que l'intégration de ces offices et de ces services au sein des grandes zones urbaines ou géographiques s'avère nécessaire. Depuis 1970, plus de 40 % de la population vivent dans 35 grandes villes de plus de 1 million d'habitants dont la plupart chevauchent une frontière séparant deux états, et exigent l'intervention d'une multitude de collectivités locales. Cependant, la forte pression en faveur d'une gestion décentralisée de services tels que l'enseignement, la sécurité et autres services publics, et l'intérêt porté à ces questions par les organisations politiques locales ont jusqu'à présent empêché la création d'administrations et d'organes politiques régionaux, bien que des accords et des échanges soient intervenus entre les unités locales. Une centaine d'accords inter-états ont ainsi été conclus en vue de résoudre des problèmes particuliers aux zones coupées par les frontières des états. On peut citer par exemple la Commission sur l'accord inter-état sur le pétrole, la Commission des pêcheries des états de la Côte Atlantique, l'Office de la zone portuaire de New York, etc.

Régionalisation et éducation

La coopération régionale n'a que très peu concerné l'enseignement de base, domaine jalousement surveillé par les communes, mais a marqué très nettement l'enseignement supérieur dans le Sud, l'Ouest et la Nouvelle Angleterre. Ainsi, le Southern Regional Education Board, SREB (office régional de l'éducation des états du Sud) repose sur un accord entre 16 états, sans intervention du gouvernement fédéral, en vertu du principe qu'on peut offrir aux habitants des états membres un enseignement supérieur de meilleure qualité grâce à une coopération entre états plutôt que par la concurrence. Le SREB a entrepris d'analyser les besoins en personnel qualifié des régions du Sud et les moyens en vue de répondre à ces besoins. L'Office de l'éducation de la Nouvelle Angleterre et l'Accord des états de l'Ouest sur l'enseignement supérieur sont d'autres instances de coopération dans ce domaine.

THE TENNESSEE VALLEY AUTHORITY, TVA
(OFFICE DE LA VALLEE DU TENNESSEE)

Le mandat de la TVA a été fixé dans le préambule de l'acte de création de l'Office en 1933. "Aménager le cours du fleuve Tennessee en vue d'améliorer la navigation ; reboiser et mettre des terres en valeur ; stimuler le développement agricole et industriel de la vallée ; construire pour la défense nationale un complexe industriel de traitement du nitrate, etc". Cet Office devint progressivement une agence de développement régional mais n'élabore jamais un plan global de développement économique et social de la région. De manière pragmatique, il a identifié les problèmes-clés du développement en vue d'y affecter les ressources nécessaires. Les résultats obtenus sont très positifs en ce qui concerne la mise en valeur des ressources naturelles, la navigation, les centrales électriques, l'aménagement touristique, etc. Il en est de même des actions de reboisement et d'amélioration des cultures conduites en relation avec les administrations de l'enseignement des états qui avaient mis sur pied un vaste programme de formation à l'intention des agriculteurs.

De plus, l'Office a aidé les collectivités locales à résoudre un grand nombre de problèmes en matière de santé publique, de distribution d'eau, de services divers. Les caractéristiques de cet Office sont les suivantes :

- il est décentralisé, a une structure très souple et délègue ses responsabilités aux organismes locaux ;
- il est de nature fédérale et indépendant des états avec lesquels il coopère ; il est public et dispose d'une grande liberté d'action ;
- il a un caractère régional ; son objectif est le développement intégré d'une zone bien définie ; il est multifonctionnel ;
- il dispose d'un budget annuel débattu et voté par le Congrès.

La TVA et l'éducation : L'Office n'est jamais intervenu dans le fonctionnement du système éducatif formel, mais il a contribué à créer un vaste système informel qui a eu des effets étendus sur la population de cette zone et en particulier auprès des agriculteurs et des ouvriers agricoles. Ces actions ont porté sur la formation à l'amélioration des cultures ; la TVA a créé des bibliothèques et des centres de formation professionnelle. Elle anime les plus importants établissements d'éducation des adultes de la zone. En coopération avec l'Université du Tennessee elle a créé 40 cours de formation pour les employés. Enfin elle a diffusé sa conception selon laquelle l'octroi des responsabilités et l'assistance permanente en vue de l'amélioration des qualifications constituent un moyen de formation efficace.

Technical Report No. 2

PLANNING AND IMPLEMENTING EDUCATIONAL PARTICIPATION IN THE ALBURY-WODONGA REGION OF AUSTRALIA

by
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I. INTRODUCTION

Albury-Wodonga is the first major initiative by the Federal government to decentralise population. Albury-Wodonga is of paramount significance in the Australian context for the study of regionalism. It affords an opportunity for the consideration and study of the form, process and issues involved in educational planning and provision at a regional level. Further, it is an ideal context within which the role of education and its contribution to individual, community and economic development can be evaluated.

1. Location of Albury-Wodonga

The significance of the location of Albury-Wodonga, in relation to the rest of Australia, is its centrality to Australia's populous South-East; specifically, it is on the main communications corridor between Sydney and Melbourne, the nation's largest cities with a combined population in excess of 5.6 million, and 200 kilometres from the national capital Canberra.

2. Scope of the Study

Constraints

This study is concerned only with schools because of the stage that the planning for education in Albury-Wodonga has reached. The Albury-Wodonga project has not yet advanced to the construction of additional educational facilities of any type, but planning is more advanced for school facilities than for facilities in the tertiary area.

Organisation of the Study

The study is organised into five sections:-

I. Introduction:
This section is concerned with briefly establishing the significance of the Albury-Wodonga project in the context of regional development in Australia. It includes a brief description of the regionalisation of education in New South Wales and Victoria as it affects the development of Albury-Wodonga as a region.

II. The Albury-Wodonga Development Corporation:
The structure of the development organisation, its legislative provisions and its goals and objectives are described as the background against which educational planning is proceeding in Albury-Wodonga.

III. Perceptions of the Role of Education in Regional Development:
Perceptions of educational contributions to the development of Albury-Wodonga as documented in plans, reports and minutes of meetings are examined in this section.

IV. The Role of Education in the Development of the Albury-Wodonga Region:
This section is the focus of the study. In it, the administrative structures designed specifically to facilitate educational planning and provision are analysed and related to the overall development process.

V. Some Implications for Future Policy and Planning:
Some of the implications arising from the previous section are discussed. A proposed regional planning model is briefly introduced and related to Albury-Wodonga.

3. Regional Development in Australia

Australia is a large, sparsely populated and highly urbanised continent, with over 86 per cent of the population in towns in excess of 1,000 people and with almost 42 per cent in Sydney and Melbourne. Five cities, including Sydney and Melbourne, dominate the nation, containing at the 1971 Census 60.1 per cent of total population.

Since the turn of the century there has been concern, at the State and Federal level, about the concentration of growth in a few metropolitan areas. In Australia, the main responsibility for regional policies rests with the State governments, and the Federal government is very limited in the extent to which it can engage in 'location-specific' activities. Most states, especially New South Wales and Victoria, have accepted the general rationale for decentralisation and have instituted various policies to achieve these ends. They appear to have had limited overall success as the trend toward concentration in the metropolitan areas continues.

As this concentration proceeded, seemingly unabated, the proponents of decentralisation became more apparent and by the early 1970s "the state of Australian cities had emerged as a major public issue" (DURD 1972-73). In response there was a renewed interest in urban affairs at the Federal level which culminated in the establishment, for the first time since 1949, of agencies charged with a national urban responsibility.

A significant move towards a national policy on settlements came in November, 1972, when the Federal Government set up the National Urban and Regional Development Authority (NURDA) to produce a five-year Australian Government Programme in urban and regional development. Later in the same year the newly elected Labor government established a Department of Urban and Regional Development.

The first report of DURD (1973) based on studies undertaken by NURDA (renamed the Cities Commission) came down very strongly in favour of a growth-centre strategy for urban development and recommended for further study a number of potential centres including Albury-Wodonga.

A series of reports for DURD by a number of overseas experts (Cities Commission 1973) was instrumental in determining policies for action. The most significant was the direct involvement of the Federal government in the development of a regional growth centre at Albury-Wodonga.

4. Albury-Wodonga Growth Centre

Of the potential growth centres, Albury-Wodonga was seen by DURD as the most suitable because of its numerous location advantages. On 25th January, 1973, the Prime Minister of Australia and the State Premiers of New South Wales and Victoria met at Albury and agreed that there should be accelerated development of a major city at Albury-Wodonga. This was followed by meetings of the Ministerial Council (discussed in Section II.1.) culminating in the designation of the development area and the establishment of the Albury-Wodonga Development Corporation (AWDC) under the auspices of the Albury-Wodonga Development Agreement signed in October 1973. The Australian and Victorian legislation was enacted in December 1973, and the New South Wales legislation in April 1974.

In setting up the Corporation the governments involved were aware that the implementation of a regional development policy was more than a simple physical planning exercise: it involved the coordination of a wide range of policies for which other departments were basically responsible. Education is a case in point, as the planning and provision of educational services and facilities are primarily the responsibility of the State Departments of Education. Each State Department undertakes its own planning and sets its own priorities independently of the AWDC and the other State.

5. Educational Administration in New South Wales and Victoria

The New South Wales and Victorian State systems of school education are similar in structure and operation. Each is administered by a Minister of the Crown through a permanent Director-General of

Education, and a centralised bureaucracy. At the central level the Directors-General are assisted by a number of Assistant Directors-General and Directors, each responsible for a specific function within the educational process. The planning of school accommodation is one such central function.

Regionalisation of Education

As would be expected with the type of structure outlined above, much of the planning and policy-making power is concentrated with the central administration. However, in both States there have been considerable movements in the devolution of these powers. Both States have for administrative purposes been divided into 11 educational regions, five metropolitan and six country. Each region is administered by a Regional Director subject to the oversight of the Director-General.

The Albury-Wodonga Development Area is part of two State Educational Regions: Riverina in New South Wales and Benalla in Victoria. Albury-Wodonga is on the periphery of both regions as the regional headquarters are located at Wagga Wagga (Riverina Region) and at Benalla (Benalla Region).

This is not fully in keeping with the theory of regionalisation which would normally presuppose a single director for a single region. While Albury-Wodonga is conceived as a regional centre, the educational administration of the region is split between two systems, represented by two regional directors, with regional headquarters more than 100 kilometres away.

As the Regional Directors are the negotiators and decision-makers for education matters in Albury-Wodonga the organisational circumstances described above place great demands on the co-ordinating role of the AWDC.

6. The Value of Albury-Wodonga as a Pilot Study

Albury-Wodonga, because of its peculiar place in regional development in Australia, is of great significance as a pilot project for further regional development and as an example of Federal/State interrelations. The many open questions surrounding the development of new centres make it extremely important to document and monitor the experience of Albury-Wodonga.

It is important for educationists to avail themselves of the opportunity to consider the planning and provision of education facilities in a regional context and in assessing the role of education in the development process.

II. THE ALBURY-WODONGA DEVELOPMENT CORPORATION

Expectations and reactions to the announcement that the Albury-Wodonga Region was to be a growth centre have been described by a newspaper journalist in the following terms (Colebatch, 1976):

> "On the banks of Australia's biggest river, surrounded by a ring of beautiful hills, astride the nation's highway and railway, Albury-Wodonga had everything going for it as a growth centre.
>
> When Gough Whitlam and Tom Uren announced at the Albury Travelodge on October 3, 1972, that a Labor Government would make the border city the base for a growth centre of 300,000 people, virtually everyone declared their support.
>
> Victoria supported it. New South Wales supported it. The local councils supported it. So, with a few exceptions, did the local people.
>
> And the Albury-Wodonga vision grew. All land within 55 kilometres of the Union Bridge was proclaimed for investigation, and the first of dozens of planning studies of the area got under way. The Albury-Wodonga Development Corporation was formed to direct and co-ordinate the project and Shoalhaven engineer Mr. Gordon Craig was appointed its chairman.
>
> In the boom of 1973-74 the twin city was going places. The big city developers started moving in. Local businesses undertook big - in some cases, very big - expansion programmes to meet the anticipated growth in demand. Yakka Jeans set up a major factory, Sanyo-Guthrie announced it would manufacture Australia's first color TV-sets there. The town was thick with consultants.
>
> Opposition was confined largely to landowners facing acquisition of their homes, and a few who expressed ideological opposition to the Government's role in the project.
>
> Gradually the vision emerged in detail. The growth centre would be made up of four distinct cities - two on each side of the river.
>
> Albury would be one centre, to the north-east, its development would spill towards another centre in the present rural locality of Thurgoona. Between them they would be planned for 150,000 people.

> South of the Murray, Wodonga too would expand in all directions. But to the south-east, a ribbon of development along the Beechworth road would connect it to the heart of the growth centre: Baranduda.
>
> Here, right at the foot of the large mountain outcrop called the Baranduda Range, the planners proposed to create the centre of the Albury-Wodonga complex; a new city designed from the start with the best town planning expertise the 1970s could offer.
>
> Top Sydney architects Harry Seidler and Associates were given the brief to design the CBD of the new city. They proposed a centre from which the motor car would be a virtual stranger in an inner core of malls and walk-ways.
>
> Meanwhile, 180 square miles surrounding the existing cities was designated for acquisition. The boundaries were defined by linking the hills that ring the twin city, and buying all the land up to their ridges.
>
> The project received $9 million in the Labor Government's first Budget, $40 million in its second Budget, and $39.5 million in its third. With it, the development corporation began buying land and planning residential subdivisions, industrial estates and rental housing to kick the centre off.
>
> Tom Uren, as Labor's Minister for Urban and Regional Development, announced a series of major Commonwealth commitments to the town. It would be the site of the Clyde Cameron Trade Union Training College, the Road Safety Standards Authority, the Australian Housing Corporation ... about 1600 public servants were to be transferred to the town in the next five years."

A report (AWDC, 1974: 9) on the initial policies and plans for the growth of the new city indicates that lessons can be learned from the building of towns elsewhere in Australia, Britain and North America. In its planning, the Corporation has sought to:-

- set firm outlines for the city in order to establish confidence and a clear framework;
- leave open the details of the plan for discussion and review by all who will be interested;
- use its technical resources to make very clear the arguments and reasons for every action it proposes;
- use these same resources to illustrate the variety of ways that can be adopted to meet a particular objective in order that others can respond with their preferences before a final choice is made;

- carefully watch the city as it is being built and be ready to change its plans in the light of experience and response.

1. Who will build the City?

The major responsibility for building the city lies with the Corporation. But while it must ensure that the city is built in an orderly and efficient manner, it will not necessarily say what is to be built.

Ministerial Council

In order to provide the machinery for co-ordination between three governments, a Ministerial Council has been appointed (Government of Australia, 1973: 15).

> "1. For the purposes of this agreement there shall be a Ministerial Council consisting of three members - An Australian Minister, a New South Wales Minister and a Victorian Minister.
>
> 2. a) The members of the Ministerial Council will be the Australian Minister for Urban and Regional Development, the New South Wales Minister for Decentralisation and Development and the Victorian Minister for State Development and Decentralisation."

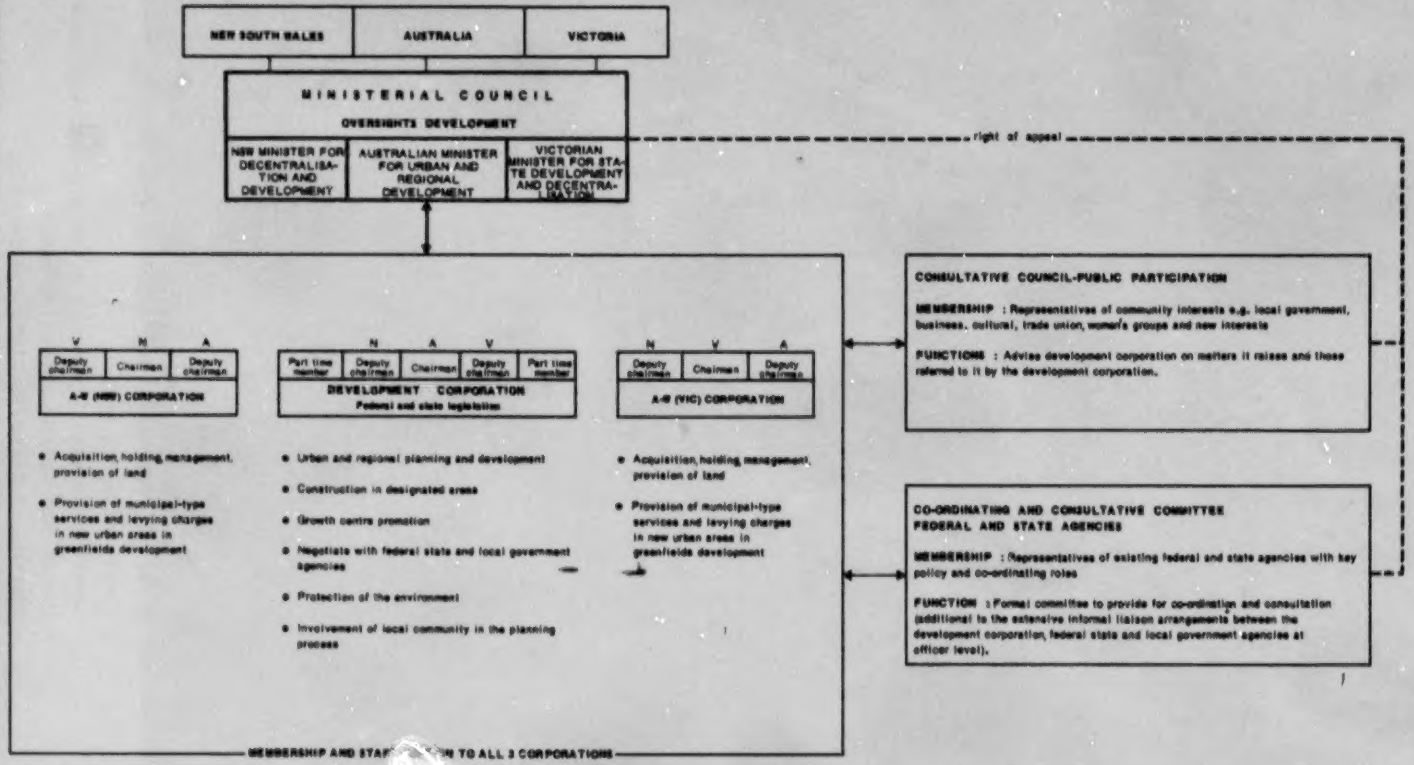
Corporation

The Development Corporation is a statutory authority constituted under legislation passed jointly by the three participating governments (Government of Australia, 1973: 16-17) to undertake, supervise and carry out regional planning and development, subject to the Ministerial Council's unanimous agreement. The functions of the Corporation are to:

a) carry out and supervise development works including

- buildings and structures of all kinds;
- gardens and plantations;
- roads and streets and associated lighting, parking areas, footpaths, guttering, ramps, and all things necessary for the control of traffic vehicles, pedestrians and animals;
- bridges and associated works;
- works for the supply and reticulation of water, electricity and gas;
- sewerage, sewage treatment works and drainage works;
- levees and river protection works;
- wharves, jetties, marinas and ferries;

Nominated by Aust. Govt.
Nominated by NSW Govt.
Nominated by Vic. Govt.


NEW SOUTH WALES
AUSTRALIA
VICTORIA
MINISTERIAL COUNCIL
OVERSIGHTS DEVELOPMENT
NSW MINISTER FOR DECENTRALISATION AND DEVELOPMENT
AUSTRALIAN MINISTER FOR URBAN AND REGIONAL DEVELOPMENT
VICTORIAN MINISTER FOR STATE DEVELOPMENT AND DECENTRALISATION
right of appeal
V
N
A
Deputy chairman
Chairman
Deputy chairman
A-W (NSW) CORPORATION
N
A
V
Part time member
Deputy chairman
Chairman
Deputy chairman
Part time member
DEVELOPMENT CORPORATION
Federal and state legislation
N
V
A
Deputy chairman
Chairman
Deputy chairman
A-W (VIC) CORPORATION

A-W (NSW) CORPORATION

- Acquisition, holding, management, provision of land
- Provision of municipal-type services and levying charges in new urban areas in greenfields development

DEVELOPMENT CORPORATION

- Urban and regional planning and development
- Construction in designated areas
- Growth centre promotion
- Negotiate with federal state and local government agencies
- Protection of the environment
- Involvement of local community in the planning process

A-W (VIC) CORPORATION

- Acquisition, holding, management, provision of land
- Provision of municipal-type services and levying charges in new urban areas in greenfields development

MEMBERSHIP AND STAF[illegible]N TO ALL 3 CORPORATIONS

CONSULTATIVE COUNCIL-PUBLIC PARTICIPATION

MEMBERSHIP : Representatives of community interests e.g. local government, business, cultural, trade union, women's groups and new interests

FUNCTIONS : Advise development corporation on matters it raises and those referred to it by the development corporation.

CO-ORDINATING AND CONSULTATIVE COMMITTEE
FEDERAL AND STATE AGENCIES

MEMBERSHIP : Representatives of existing federal and state agencies with key policy and co-ordinating roles

FUNCTION : Formal committee to provide for co-ordination and consultation (additional to the extensive informal liaison arrangements between the development corporation, federal state and local government agencies at officer level).

  - public amenities including baths, bathing areas and other areas for sport and recreation; and
  - all other works for, or incidental to, the foregoing.

b) negotiate with Australian, State and local government authorities for the purpose of arranging or providing services and facilities in the growth complex;

c) construct shops, offices and factories to be made available to a State Corporation for use on a commercial basis in conjunction with State authorities;

d) create job opportunities by encouraging the setting up of industries and other investment in the growth complex;

e) carry out other functions of a promotional character determined from time to time by the Ministerial Council.

Figure 1 illustrates that there are, in effect, three corporations. The State Corporations acquire, hold, manage and provide land in the areas designated for urban and regional development. In two ways the Corporations share a common identity. The Chairman and Deputy Chairmen of the Albury-Wodonga Development Corporation also sit on the Boards of the State Corporations. Staff are also common to the three Corporations.

The Chairman, nominated by the Australian Minister, is to hold office for up to seven years and is eligible for reappointment. Deputy Chairmen are nominated by the two State Ministers, hold office for up to five years and are also eligible for reappointment. Two part-time members representing the local communities hold office for up to three years.

Consultative Council

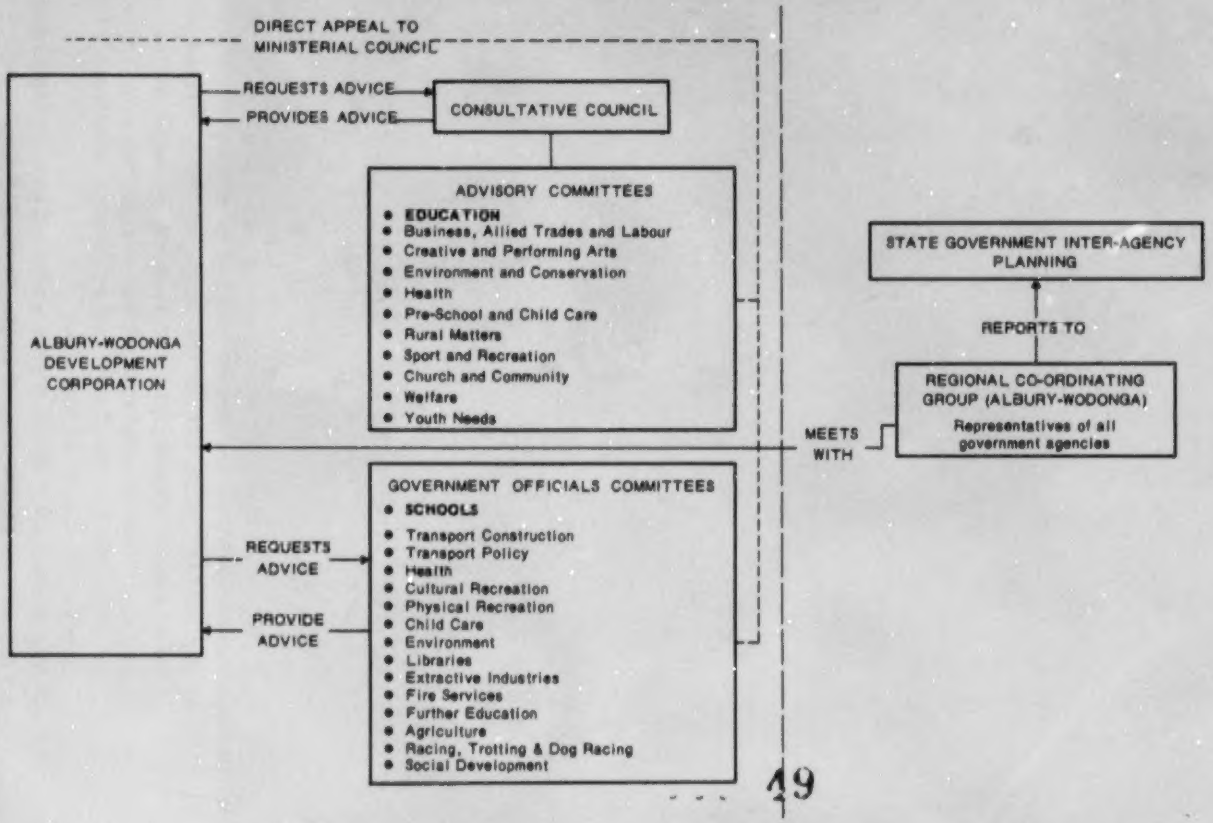
In May 1974 the Consultative Council held its first meeting but had been functioning previously for a year as an interim body (AWDC, 1974: 13). The functions of the Council (Government of Australia, 1973: 19) are:

> "... to advise the Development Corporation in relation to the development of the growth complex in respect of
>
> a) any matter coming within the scope of the functions of the Development Corporation of direct consequence to the existing or future inhabitants of any designated area in relation to which matter the Consultative Council considers it desirable to tender advice; and
>
> b) any matter upon which the Development Corporation requests the advice of the Consultative Council."

The Council represents community interests, including local government, business, cultural, charitable, trade union, education

48

Figure 2. ALBURY-WODONGA DEVELOPMENT CORPORATION STRUCTURE AND ITS RELATIONSHIP TO GOVERNMENT INTER-AGENCY PLANNING UNIT


DIRECT APPEAL TO MINISTERIAL COUNCIL
REQUESTS ADVICE
PROVIDES ADVICE
CONSULTATIVE COUNCIL
ADVISORY COMMITTEES
EDUCATION
Business, Allied Trades and Labour
Creative and Performing Arts
Environment and Conservation
Health
Pre-School and Child Care
Rural Matters
Sport and Recreation
Church and Community
Welfare
Youth Needs
ALBURY-WODONGA DEVELOPMENT CORPORATION
STATE GOVERNMENT INTER-AGENCY PLANNING
REPORTS TO
REGIONAL CO-ORDINATING GROUP (ALBURY-WODONGA)
Representatives of all government agencies
MEETS WITH
GOVERNMENT OFFICIALS COMMITTEES
SCHOOLS
Transport Construction
Transport Policy
Health
Cultural Recreation
Physical Recreation
Child Care
Environment
Libraries
Extractive Industries
Fire Services
Further Education
Agriculture
Racing, Trotting & Dog Racing
Social Development
REQUESTS ADVICE
PROVIDE ADVICE

and women's groups. Nearly 230 district residents, many with expert knowledge in their field, are working as committee members to collect information and recommend courses of action to the Consultative Council. A number of sub-committees and interest groups have been established in the areas of education, sport and recreation, youth needs, the church and the community, health, rural matters, welfare, environment and conservation, pre-schools and child care, creative and performing arts, and business and allied trades (AWDC, 1974: 78). The Advisory Committee on Education indicated in Figure 2 includes in its membership elected representatives from both States of parents, catholic schools, government schools and teacher organisations.

Co-ordinating and Consultative Committees

Joint participation of Federal and State government agencies is provided through a series of committees more commonly termed Government Officials Committees. There is no single group co-ordinating the activities of committees as occurs with the Consultative Council. Committees at this level of government meet regularly and occur in the areas of transport construction, health, transport policy, cultural recreation, physical recreation, child care, schools, environment, libraries, extractive industries, fire services, further education, agriculture, racing-trotting-dog racing and social development.

2. Charter for Development

The goals of the three governments in developing the Albury-Wodonga Region are contained in the Albury-Wodonga Area Development Agreement and "side" letters to the Agreement. These goals, implied or explicit, range over a wide area.

. Local involvement

> The continuing involvement of the local communities is (also) an essential ingredient of success, and we must remember this.

. Special financial assistance

> The Australian government will (also) during the early years of the development of the growth complex be prepared to provide special financial assistance to the States to assist in the financing of the provision of facilities and services ordinarily the responsibility of the States ...

. Pollution control

> ... priority will be given to control of pollution ... and to protection of environment not only of the centre itself but also of areas which will be affected by the establishment of this new growth complex.

Broad Goals

A series of broad goals have been stated (AWDC, 1974: 17-19) which provide a common basis for extensive planning choices as well as detailed policy decisions. They are stated here in summary:

- Growth and opportunity
  Rapid development in Albury-Wodonga requires sufficient incentives to existing and potential residents to encourage a dynamic level of growth in the area ... These incentives should include real opportunities in housing, employment, education, health and recreation and should extend as far as possible to the total quality of life within the community, its obvious priorities, its responsiveness to human need and the regard it earns as a successful and desirable place to live.
- Flexibility and efficiency
  The plans and proposals for the new development should be sufficiently flexible to allow for social changes which will occur in an evolutionary sense, and for more wilful changes as, for example, new resources become available, or as new social commitments become apparent.
- Excellent human and social services
  The development should provide for its residents a full and accessible range of health, education and welfare facilities and services which represent the most advanced and creative thinking in regard to their character and performance, and which are responsive to as wide a range of human needs as possible.
- High environmental quality
  As recognition grows of the potentially adverse impacts of major urban developments on both man-made and natural environments, it becomes increasingly important that a positive approach to sensitive environmental planning be taken ...
- Public responsiveness
  Throughout the preparation of plans for Albury-Wodonga, and into the implementation period there should be opportunities for participation by the affected public, both in terms of its right to know what decisions are being made, and in terms of its right to be party to those decisions.

Immediate Objectives

In 1973 the Ministerial Council in defining the Albury-Wodonga Area agreed that smaller areas known as "designated areas" would be the sites for the development of the new city. The prime development sites identified within this area all represented potentially attractive sites for new urban growth and collectively could have accommodated a population far in excess of the target of 300,000 people (AWDC, 1974: 45).

The Initial Proposals Report (AWDC, 1974) proposed that the next step in planning should be to concentrate on medium-term (ten-year span to 1985) and short-term (five-year span to 1980) planning. In September 1974 the Corporation commissioned a study (Llewelyn-Davies, 1975) of strategic plans for the short- and medium-term growth of the new city. This study also examined phasing alternatives in order to recommend where the main thrust of development was to occur over the medium term. The question for the study team was stated (Llewelyn-Davies, 1975: 6) to be:

> "Given the need for an emphasis of growth in at least one of the new areas of development where should this occur - Thurgoona (north) or Middle Creek (south)?"

In April 1975 the Development Corporation supported a recommendation that the first thrust of its new development should be in the Middle Creek (or Baranduda) area of Victoria (AWDC, 1975 b). The major reason for adopting this strategy was to bring the Victorian side of the Albury-Wodonga growth centre to a population level comparable with that of the New South Wales side.

> "The consultants have investigated and evaluated moves for development in a number of different ways. They recommend - and the Corporation favours - an emphasis on development in the Middle Creek area and, in the early years, an allowance for natural development to the north, in the Thurgoona area."

The short-term (five years) development planned for this area is to provide residential facilities for 6,000 people, for the medium term (ten years) a population of 20-30,000 and in the long term the central area is to become a major town centre within the Albury-Wodonga area. At this stage (1976), the Corporation and government officials are immediately concerned with the planning of facilities for the short term.

3. Current Constraints

The impetus for the Albury-Wodonga growth centre emerged during the period of Labor government in Australia. In November 1975 a Liberal government assumed office and acted swiftly in a comprehensive series of moves to reduce government spending. The Development Corporation was ordered not to let any large-scale contracts until further notice. By November 1976 the Federal government had indicated its support for Albury-Wodonga by providing $21 million for the 1976/77 financial year to cover a development program ($16 million), administration and land purchase ($5 million).

III. PERCEPTIONS OF THE ROLE OF EDUCATION IN REGIONAL DEVELOPMENT

This section examines the participants' perceptions of education's contribution to the development of Albury-Wodonga. These perceptions are documented in plans, reports and minutes of meetings of the Albury-Wodonga Development Corporation and its co-ordinating and consultative committees. It is possible to identify three main areas in which education is seen to contribute to regional development: individual development, community development and economic development. Although considered separately these areas should not be seen as mutually exclusive.

1. Individual Development

In the documentation, no statements were found which specified the view that individual development is a significant contributor to regional development of Albury-Wodonga. Its contribution is nonetheless inferred in statements relating to the aims of education for the region.

Pettit (1976: 7) in the study "Education for Baranduda" places a strong emphasis on individual development in stating that the aims of education should be:

a) To provide an educational system in which the welfare and development of the student as an individual and as a member of society are of paramount importance.

b) To provide human and material resources for the intellectual, physical, aesthetic, spiritual, emotional and social development of the individual.

c) To promote a sense of achievement and competence in students working at different paces but sufficiently flexible to permit some degree of pupil choice.

d) To develop social and academic systems small enough to be of significance to the individual.

e) To transfer to the student at the appropriate time the responsibility for making his own decisions through a graduated process of interaction and participation with teachers and parents.

f) To promote the growth of the school in society without weakening its basic educational functions and purposes.
g) To allow all members [illegible] the public maximum access to educational experiences.
h) To allow all members of the public maximum possible usage of school facilities and encourage school use of other civic, industrial and commercial facilities.
i) To encourage each school to develop and implement the educational philosophy most appropriate to the needs of its students and society both local and national.

These aims emphasise the great need for education to be involved with individual and community development.

In these aims, Pettit expresses his perception of the need for a close link between the individual and society in developing Albury-Wodonga - a theme reiterated throughout the study. Society in this context is equated with community. Individual development is seen as being dependent upon a high degree of interaction of the individual with the community. The corollary of this is that community development derives from and is dependent upon the development of, and interaction with, individuals. Individual development in this way is seen as contributing to community development and ultimately regional development.

The significance of individual development in this role is exemplified by a quotation in "Education for Baranduda" (Australian Schools Commission, 1973).

> "(It is) the right of every child to assistance in developing a variety of socially desirable attributes which might both afford him personal satisfaction and contribute to an improved quality of community and cultural life."

Economic development is another area which benefits from individual development, especially from the provision of suitably qualified manpower for regional activities. According to Pettit (1976: 67) the residents of Albury-Wodonga expressed the views, through surveys and interviews, that the end product of the educational process should be characterised by the following attributes:

> "... a person fitted for adult life; or for tertiary education."
> "... a person capable of reaching his/her full potential."

References to the nexus between individual development and regional development are limited and are only found in Pettit's study, "Education for Baranduda". Given the nature of this study it is reasonable to expect that it would contain a discussion of the issues relating to individual development. Individual development is seen very much as an educational issue. Nevertheless the endorsement of the Pettit study by the Albury-Wodonga Development Corporation and its committees implies the acceptance of the principles expressed.

2. Community Development

The contribution of education to social and community development receives prominent mention in the documents relating to the planning of Albury-Wodonga. From the inception of the project the planners postulated that the development would encounter the social problems of assimilation that are particularly acute in all new town projects involving accelerated or rapid growth.

The broad goals of the AWDC as outlined previously in Section II.2. express their concern for the social aspects of a developing Albury-Wodonga. The following statement (AWDC, 1974: 73) suggests that a solution for the social problems lies in the implementation of social development policies:

> "The development of Albury-Wodonga as a successful and coherent community in its own right requires a whole set of efforts by the Corporation which concern existing and future social conditions of the new city. These efforts can broadly be described as social development or social planning efforts since they concern the creation of ways and means whereby social expectations and requirements will be understood and met both initially and over time."

A major area of effort, as perceived by the AWDC, in the achievement of social development is the proper provision of human and social services and facilities including hospitals, schools, health clinics, welfare centres of various kinds and recreational facilities. In the residential neighbourhoods of the planned new town, education, or more correctly the school, is seen as a key element of provision and of the social development of the people. In this context social development is equated with community development.

Education's contribution to community development is identified in three main areas:

The School as a Provider of Community Facilities

The Corporation is aware that there is likely to be a shortage of facilities in the early stages of development, and sees the school as providing some of the physical facilities necessary for community development. As it is the government's responsibility to provide schools for children, the schools are likely to be the first community facilities built and for this reason the Corporation is anxious to explore the possibilities of designing and staffing schools as community facilities that go beyond the provision of accommodation for merely formal education (AWDC, 1974: 74).

> "It is to be expected that there will be a considerable overlap between schools and the community at large in the use of facilities such as halls and playing fields."

Pettit's (1976: 2) terms of reference for the study "Education for Baranduda" instruct him:

> "to investigate and make recommendations concerning the feasibility of shared facilities."

In the recommendation of the study he states (Pettit, 1976: 81):

> "that educational facilities and services should be integrated with other social, recreational and cultural facilities and services for use by the general public."

The School as the Focus of the Community

As an extension of the concepts of "sharing" and "integration" outlined above, the school is seen as the centre of the community. Pettit (1976: 24) expresses the view that at the community level:

> "... a key component (of integration) is the school, rich in human and physical resources and facilities with which more people are compulsorily associated than any other local institution and which therefore forms a natural focus."

Because of its associations with a large cross-section of people in the community, the school is regarded as "one of the most frequently visited facilities and one which can create a local identity" (Pettit, 1976: 25). For this reason it is seen as the most logical core around which to provide social services. This concept is expressed in physical design terms in the report "Albury-Wodonga Short and Medium Term Plans" (Llewelyn-Davies Kinhill Pty. Ltd., 1975: 84). The plans for the development of the first neighbourhoods at Thurgoona and Baranduda locate all social facilities on a clustered basis in an "activity centre". The school is seen as the key element of these activity centres.

Educational Provision as an Incentive to Growth and Development

In their "Initial Proposals" the AWDC (1974: 16) suggest that there will "need to be adequate 'pull factors' to induce people to leave the cities for growth centres like Albury-Wodonga". They suggest that the "pull factors" or incentives should include real opportunities in housing, employment, education, health and recreation. Where good educational facilities are available for staff and their families it is seen by the AWDC as being an attraction to locate in the area.

To attract people to Baranduda it is intended (Pettit, 1976: 3) that educational facilities and services of the highest quality be provided and that:

> "... Baranduda be in the forefront of education in Australia, (and) a source of pride for the people of Albury-Wodonga."

3. Economic Development

All forms of education other than the tertiary sector, are included in the category of non-basic industry, for purposes of the AWDC's analysis of future employment. The non-basic category is not regarded as a contributor in its own right, but as a subsidiary contributor to the growth in total employment of Albury-Wodonga.

Tertiary education is seen to be of paramount importance to the economic development of the region by the AWDC. Documents emphasise that a university "will represent a significant generator of employment" (AWDC, 1974: 42).

This emphasis is in vivid contrast to the few minor references made in the Corporation's documents to the role of the school as a generator of employment in, and the economic development of, the region.

IV. THE ROLE OF EDUCATION IN THE DEVELOPMENT OF THE ALBURY-WODONGA REGION

The overall planning and development of the new growth centre is the responsibility of the Albury-Wodonga Development Corporation, but the provision of water and sewerage services, roads, schools, health services and nursing is the responsibility of the various state government authorities. The Co-ordinating and Consultative Committee has been renamed the "Government Officials Committee" and provides for involvement of federal and state agencies having key policy and co-ördinating roles in the region. Community involvement in planning is fostered through a community-based Consultative Council.

1. Education and the Organisational Structure

Planning of schools and related services is the joint responsibility of the Corporation and State authorities. However, one of the Corporation's important functions is to ensure that an overall strategy plan is acceptable to all those concerned in providing school services. In addition to the Corporation's overall planning activities, two specific bodies operate in planning for education within the centre - the Government Officials Committee on Schools and the Advisory Committee on Education.

Educational Sub-Committees

The Government Officials Committee on Schools was formed because of difficulties experienced in planning locations for the schools of two large government education departments. It consists of representatives from the Corporation, State, Australian government and Catholic school authorities. In order to obtain community views on the provision of education services for the Albury-Wodonga growth centre, the Consultative Council has utilised a previously-established Advisory Committee on Education with membership drawn from representatives of government, catholic and private schools, parent organisations, continuing education centres, teacher associations, students and other interest groups.

Relationships

The structural relationships between the educational sub-committee of the Consultative Council and the Government Officials Committee are shown on Figure 2, together with other components of the organisation. Both sub-committees exercise essentially an advisory function for the Corporation. The relationship between the sub-committees appears to be one designed to achieve maximum integration and co-operation. The Government Officials Committee on Schools is, however, the only body having formal policy links with state education authorities. For the large government school systems, a regional director is the senior representative in the area but is required to obtain ratification from head office on major policy items.

Perspectives on Inter-Sectoral Planning

Reports of committees indicate through the nature of their membership and activities an awareness at least of the importance of relating education to other service agencies (Government Officials Committee on Schools, 18/2/76).

> "... within the committee structure there is the opportunity for joint meetings of other Officials Committees to co-ordinate overlapping interests of the various Government Departments."

In a major report (Pettit, 1976) prepared for the Corporation, extensive perspectives on education were obtained from specialists in education and related areas, the pre-schools services of a metropolitan local government area, a state library authority and state and national educational planning agencies. However, within the educational sub-committees, inter-sectoral perspectives appear to be limited to the formal interaction provided by the contributions of Corporation planners.

Involvement in Planning at System, School or Interest Group Levels

The existence and prescribed role of a Government Officials Committee on Schools representing government and non-government school systems in Victoria and New South Wales, and national education agencies is an indication of the provision made for systems to be involved in the educational planning for this growth centre. The draft terms of reference (AWDC, 1975a: 2) for the Pettit study (1976) indicate the extent of involvement expected.

> "Information will be made available as and when determinations are made on the likely demographic, social and economic characteristics of the population moving into the area, on the types of housing ... on current attitudes and possibilities for the education pattern expected to be provided by the (State) Department of Education within this area, and on the potential for change.
>
> "This implies that there would be substantial input during the course of the study from officers of the (State) Department of Education and the Albury-Wodonga Development Corporation in this study."

At the local community level, provision is also made for schools and interest groups to offer advice to the Corporation through established lines of communication as described above. The extent to which these formal provisions for involvement and inter-agency cooperation have been effective will be taken up in Section IV.3.

2. Output

One of the broad goals intended to act as a basis for planning in social services for the Albury-Wodonga centre indicated (AWDC, 1974: 18) in the initial proposals report that:

> "The development should provide for its residents a full and accessible range of health, education and welfare facilities and services which represent the most advanced and creative thinking in regard to their character and performance, and which are responsive to as wide a range of human needs as possible."

In this same report (AWDC, 1974: 74), the impetus for the major output from the described organisational structure originated from the statement that:

> "... a detailed study is necessary to establish the implications of accelerated growth and a survey of educational facilities is currently being undertaken by the Education sub-committee of the Consultative Council."

Reasons for a Study of School Needs

A proposal for a study of future school needs of Albury-Wodonga was drawn up in August 1975 (AWDC, 1975 a), but was not undertaken due to cutbacks in government funds. However, expectations for the study are similar to a proposal finally approved in December 1975. Stated reasons for the study were briefly:

i) to integrate and co-ordinate all school planning within the region;
ii) to develop an overall strategy plan for the provision of school services in the region;
iii) (to examine) the likely effects on planning proposals of the present and future policy decisions of the Australian and State education authorities; and
iv) (to undertake) a broad examination of likely changes in trends in the general fields of schools up to the turn of the century, particularly those likely to affect the physical planning of schools ...

Significance of the Study

Apart from providing a strategy plan for school development in the region the study was at least initially expected to have more universal significance related to the central concern of this study. The Government Officials Committee perceived this significance in the following terms (AWDC, 1975 a):-

> "... The Officials Committee sees considerable benefit in a study being undertaken that will be a pilot for other regional school studies in Australia. The involvement of planning and administrative personnel from all levels of Government, together with a consultant input, would enable a better interaction between planners and administrators to occur. Thus a further objective of this study would be an in-depth evaluation of the methodology and format of the study itself. This should provide important guidelines for future regional education studies of this type."

Education for Baranduda

The completed study, entitled "Education for Baranduda" (Pettit, 1976) reflects the Corporation decision to have the major thrust of early development in the Middle Creek (now termed Baranduda) area. Finance for the study was provided jointly by the Corporation and government. In summary, the study report (Pettit, 1976: 80) recommended a three-tier school system of junior, middle and upper schools. The junior and middle schools should share a joint site and "be the focus of the neighbourhood by providing extensive facilities adjacent to the activities area". The upper school should be located in and be part of the city. It should be "strongly outward looking towards the life of the city and the civic facilities that it will use", and be "a special educational resource centre available to people of all ages through its extensive integrated use by other educational systems".

Community Contributions

Expectations for the Baranduda report referred to the need to "incorporate, as far as possible, the concerns of all local parties interested in education", being a "vitally important acknowledgement of the constraints that should work to prevent planners operating in vacuo" (Pettit, 1976: 1). Due to constraints of time, the sampling of local opinion was considered by the researcher to be "very restricted". Furthermore, the views presented were "not only the views of an informed elite, but also the views of a group who, for the most part, will not be using the Baranduda facilities themselves" (Pettit, 1976: 94).

Reactions

Beyond the state education system, reactions to the educational study have been noted in two areas. The Catholic Education Office in Victoria sees the concept of multi-purpose usage of school sites as "worthwhile", but is "not yet sure of how it could best fit in" with the Upper School in the City concept (Government Officials Committee on Schools, April 1976). One of the state government systems appears to be not prepared at this stage to be bound by the Report because the substantial implications for the structure of a state system would have to be carefully analysed. "Whole-hearted support" was expressed by the Advisory Committee.

> "The Advisory Committee on Education expressed its appreciation of the chance given it to participate in a worthwhile project from its commencement; to have been allowed to participate at all stages and to have had the opportunity to express its viewpoint and to have cognisance taken of that viewpoint."

Implementation

The Corporation adopted the recommendations of the "Education for Baranduda" report in May 1975 for the purposes of "allowing wider community discussion" and advising the appropriate state authority that it be used "as a basis for preliminary planning" (AWDC, 1976). By October 1976, the state authority had taken the initial step of being "prepared to accept commitment of 6.07 ha (15 acres) to the first stage of development at Baranduda".

3. Analysis

A distinction has been made (OECD, 1974) between participation in planning and a participatory planning process, that is, a process which is "dominated by effective participation as its major operational objective". Hayward (OECD, 1974, 18) also considers that "the process" involves the "deliberate organisation of various mechanisms" to achieve this. While various mechanisms reflect the cultural and social traditions of countries or education systems, an additional underlying question is the direction of the process. For example, is the process directed at merely obtaining information from the clients or at promoting open discussion, understanding and setting of priorities? This section of the study focuses on the mechanism for participation in educational planning and total planning for the Albury-Wodonga growth centre (AWDC, 1974: 18).

> "Throughout the preparation of plans for Albury-Wodonga, and into the implementation period there should be opportunities for participation by the affected public, both in terms of its right to know what decisions are being made, and in terms of its right to be party to those decisions. Participatory mechanisms allowing this should reflect the character and capability of people to perceive the nature of decisions in lay terms."

The formal structure for participation is illustrated in Figure 1. The process and mechanisms for participation (both formal and informal) are more complex and are revealed by government departments involved in planning and education, local advisory committees, the Corporation and education consultants. Interviews were conducted with persons working in all of these areas. Comments were not statistically analysed, and only the dominant issues are noted here. Reported perceptions therefore cannot be assumed to apply to all respondents.

Involvement in Educational Planning

At the levels of government agencies, the Corporation and the community, the process of involvement in planning for education was perceived in varying ways.

Benefits from involvement. A wide range of benefits was perceived to have been derived from intersystemic and community involvement in educational planning for the growth centre. These benefits were briefly listed as:

i) A wide range of people was involved;

ii) Edcuational goals and plans were clarified. In the early stages of planning there were considerable delays and apparent contradictions between participants. The Baranduda study (Pettit, 1976) facilitated the preparation of plans by establishing some clear directions;

iii) Improved intersystemic co-ordination. Government and non-government school systems in both States were perceived to have worked closely together to promote an harmonious planning approach;

iv) Community involvement was developed. The Advisory Committee on Education (Figure 2) was formed before the Consultative Council, and in spite of early confusion about their role, disenchantment with the Corporation and problems of modifying educational idealism to local exigencies, representatives of the community were more than satisfied with their involvement in the Baranduda study. Minutes of a Government Officials Committee on Schools (27 April, 1976) note:

> "The Advisory Committee on Education expressed its appreciation of the chance given it to participate in a worthwhile project from its commencement; to have been allowed to participate at all stages and to have had the opportunity to express its viewpoint and to have had cognisance taken of that viewpoint."

The process of involvement. Aspects of both the structure and the process which were perceived to have restricted involvement in educational planning are listed as follows.

i) Inadequate recognition of the concepts of community involvement in education. There was a strong opinion that some decisions and attitudes had pre-empted involvement in planning. An example was described where arterial roads were planned which would have separated open recreational fields from schools and where a school site was reserved at the junction of two major roads. At the same time there was pressure from engineers wanting to firm up on proposals for roads and housing while education committees were still trying to grasp the implications of the Baranduda report (Pettit, 1976).

ii) Roles and relationships. Neither the Albury-Wodonga Development Act 1973 nor the formal structure described in Figure 1. indicate the ways in which inter-agency co-ordination among government authorities may be achieved or the linking up of community-based advisory committees with the responsible government agency.

a) the Corporation: One perception by a government official of the role of the Corporation indicated that:

"The Corporation haven't seen themselves as being the focus for causing the interaction between the Advisory Committee and the Officials Committee, and in many instances have dealt separately with each of us."

A member of the Government Officials Committee on Schools described the "putting together" of local involvement with the responsible administrative agency in these terms:

"We have never had an inter-agency co-ordination meeting organised at Corporation level, nor have we had the Officials Committees of the various community services. "... as a process the thing was falling down at the outset ... the process of tapping local participation and wedding it to the responsible administrative agency just didn't happen."

b) Consultative Council, Committees and the Albury-Wodonga Regional Co-ordinating Group. A member of the Advisory Committee on Education had to think carefully when asked what the role of the Consultative Council was, and then was "not sure". Both the Corporation and the Advisory Committee have dealt directly with each other, thereby bypassing the Consultative Council. The justification for this was:

"If you want something done in a hurry ... it's better to 'short-circuit' the whole system."

While legislation details the role of the Consultative Council, at the community level there was a perception of confusion.

"... they're in confusion themselves because they're a selected and not elected body. Their membership has always been in contention - about who selected them and why."

The relationship between the Government Officials Committee and the Advisory Committee was initially "contentious", was still seen to be "tenuous", but considerable co-operation had occurred as a result of the Pettit study. One of the difficulties noted here was the scheduling of meetings during the daytime for government officials, while community members were engaged in their own commitments. A question referring to the importance of inter-agency co-ordination through the Albury-Wodonga Regional Co-ordinating Group was met with the response - "Who are they?" Further details on the operation of this Group are noted below.

c) Apparent change in role. Confusion and frustration about the role expectations of education agencies, the community and Corporation are described in the following comment.

"That side of it (combining local participation with the responsible administrative agency) is in my mind bad enough, but when you get to the point where I think libraries, health, and certainly from our (education) point of view, we're at a point where as an agency we believe we have an approach that adds up to something quite exciting and could be implemented were Albury-Wodonga to grow - we now find that the Corporation believes it has no role to facilitate that locally, and the sort of agency activities and co-operation locally are going to be left back to ourselves to generate."

iii) Other obstacles to involvement noted were the wastage of time travelling to meetings, the inability of community members to grasp ethereal planning concepts, the bureaucratic rigidities of two government school systems, reduced confidence resulting from uncertainties in government funding, teacher domination of the Advisory Committee and the cumbersome size of the Government Officials Committee. Comments on those factors that were perceived to have facilitated involvement in educational planning were less spontaneous. However it was stated that:

a) regionalisation of the administration of educational systems in both States has resulted in interrelationships that could not have occurred otherwise and a capacity to identify local needs;

b) a working party established outside the Corporation framework was able to resolve differences that were hindering the implementation of plans for education;

c) the local media were used to tap expectations of the community for schooling; and

d) the wide brief for the educational study of Baranduda, and its ultimate acceptance "pulled a lot of loose strings together".

Recommended changes. Many of the changes that could be implemented to facilitate participation are implicit in the perceived obstacles noted above. However, the following points were noted in addition or in reinforcement.

i) Advisory Committee and Government Officials Committee. Roles need to be more clearly defined, local opinion can be monitored more extensively, and there should be more joint meetings of community and government committees.

ii) Local project group manager. The appointment of a locally-based project manager could be a focal point for the co-ordination and implementation of plans for education in the growth centre.

iii) Regional education authority. Establishment of one educational authority to rationalise school facilities across the border of two States was also mentioned.

Integration of Education into Total Planning

Reference has already been made to the apparent inadequacies in the structure of the Albury-Wodonga Corporation in facilitating inter-agency co-ordination. In this section, involvement in educational planning is expanded into an examination of the extent to which community and government educational groups were integrated into total planning for the growth centre.

Benefits from Integration. The Albury-Wodonga Regional Co-ordinating Group means that a co-ordinating mechanism has been extended to an operational level to:

> "... ensure effective co-ordination of the activities of all agencies participating in the achievement of the policies of the Government."

The Group is an innovation of one of the States' planning agencies, but as a member of the Government Officials Committee on Schools commented, "if this had not occurred there was no apparent structure to bring this about". One of the advantages of the Group as perceived by a government planner was that it:

> "... meant that people could air their differences together ... and be able to co-ordinate the activities of the various government departments in the growth area in conjunction with the AWDC itself."

This mechanism has been considered to be so successful that it is being applied in other growth centres. There has not only been more co-operation between government departments, but a greater awareness of the advantages to be obtained. In contrast, at the community level, the Advisory Committee on Education "never set out with total integration in mind", believed that "someone else would handle it", and was "more concerned with 'bread and butter' issues in schools".

The process of integration. The perceived difficulties that were stated in achieving involvement in educational planning were reflected again when the question of integrating educational planning into total planning was considered. One government official considered that "there has been nothing in the structure which has facilitated integration".

> "It's hardly given any participant a real opportunity to develop their actual roles to the full. In instances where they've gained some role they've virtually had to demand it, and in others where there's been a potential role for advisory committees they've never achieved it - and now you're flat out getting advisory committee members to a meeting they're so disillusioned."

Additional points to those noted above, under "The process of involvement" were as follows:

i) Multiplicity of planning agencies. The following diagram illustrates the range of planning agencies connected directly or indirectly with the growth centre.

Figure 3

RANGE AND NUMBERS OF PLANNING AGENCIES OPERATING
IN ALBURY-WODONGA GROWTH CENTRE

FEDERAL GOVERNMENT
GOVERNMENT PLANNING AGENCIES GOVERNMENT SERVICE AGENCIES

STATE GOVERNMENTS
GOVERNMENT PLANNING AGENCIES GOVERNMENT SERVICE AGENCIES

LOCAL GOVERNMENT
RURAL CITIES RURAL SHIRES

ALBURY-WODONGA DEVELOPMENT
CORPORATION

Such a range of agencies was perceived to have created difficulties in achieving integration between all levels of government. Another aspect of this too is that most of the officials responsible for the various services are located outside the Albury-Wodonga centre.

ii) Decisions pre-empted. The extent to which decisions in education had been pre-empted was referred to earlier. Similar comments were made in relation to the achievement of integrated planning. One government official noted that:

> "(Early transport studies) effectively pre-empted any land use planning based on any of the concepts of education, or health or anything else."

Similar difficulties were encountered by a consultant.

> "We had to fight Corporation planners very hard because they wanted to draw up plans on paper ... before they'd even asked what the role of the education building was going to be. They wanted to draw lines on maps."

The singular comment made in response to a question on the extent to which integration of planning had been facilitated came from a government planner who noted that governments are now more aware of the need for co-ordination.

Recommended changes. Two major changes in the Albury-Wodonga structure were recommended to bring about increased integration in regional planning.

i) Extension of regional planning. The Albury-Wodonga Area boundary was defined by a circle of 55 kilometres radius centring on the cities of Albury and Wodonga and included 9,500 square kilometres. Subsequent studies reduced this area ("the designated area") to 5,000 square kilometres and still excluded the two cities. The need for extension of the regional planning area beyond "the designated area" was recommended by one government planner. He considered that multiple planning authorities "must be confusing to anybody" and there was a need for greater co-ordination between local planning authorities and the Corporation.

> "It's not much good preparing minute plans for a growth centre if what's happening on the periphery has an adverse effect on it."

Confidence was also expressed in the ability of the Corporation to assume this extended responsibility because it had been "an invigorating force" and had "introduced a greater awareness of planning";

ii) The Corporation and its role in inter-agency planning. The need for a closer relationship between Government Officials

Committees and the Corporation through some inter-agency provision was strongly recommended. An extension of this mechanism would not only ensure inter-agency co-ordination on a state basis but would facilitate a unified effort between two States.

V. SOME IMPLICATIONS FOR FUTURE POLICY AND PLANNING

The previous sections of this study have provided a descriptive background of the participation of education in planning for the development of the Albury-Wodonga Region of Australia. Section IV attempted to provide some assessment of the effectiveness of participation in educational planning and of the extent to which education had been involved in an inter-sectoral approach to regional planning. This final section focuses solely on these two dimensions in relation to an organisational model. Experience in the Albury-Wodonga Region may provide indicators for more effective participation and integration in planning not only for the Region itself but for other participatory planning projects.

1. The Albury-Wodonga Model

Section II provided a formal description of the structure of the Albury-Wodonga Development Corporation and the functions of its various components. In summary the major features of this structure as a planning model are illustrated in Figures 1 and 2, and are listed as follows:

i) A statutory authority has responsibility to undertake, supervise and carry out regional planning and development,

ii) Formulated plans require the unanimous approval of a ministerial council representing the participating federal and state governments,

iii) Public participation and advice is provided through a nominated council and elected sub-committees covering a range of interest groups,

iv) Combined meetings of federal and state government officials co-ordinate planning in their specific areas of special responsibility.

Participation in Educational Planning

Assessment of participatory mechanisms should consider their operation at both the public and government level. In education systems which have traditionally been highly centralised, regionalisation has provided an avenue for extended participation of educational administrators. This consideration tends to be overshadowed, however, by media publicity of public participation.

Some issues for consideration in refining participatory mechanisms in educational planning have been extracted from the Albury-Wodonga situation.

Structures. Where the formal structure for participation is either unknown to the participants or is inadequate, the process breaks down. Role expectations, rules and relationships need to be known and accepted by participants. Any component of a structure that is permitted to deteriorate makes subsequent creation of interest in participation so much more difficult. Structures therefore need an in-built mechanism for re-adaptation rather than face a lingering death.

Elected or nominated bodies? In the formative stages of participation where representative groups are not easily identified there may be a case for nominating community members to planning committees. However, an elected membership would appear to be necessary in democratic decision-making.

Expectations. Expectations for participation in regional planning can be excessive when participatory procedures are not established at the central level. Where planning procedures are not pervasive through an education system, difficulties are created at the regional level when development bodies are expected to apply participatory mechanisms. In the case of the Albury-Wodonga growth centre, expectations need also to be tempered by the involvement of three levels of government (federal, state and local).

Perspectives. When expressed goals for regional development refer to participatory mechanisms, questions can be asked about the source of the necessary perspectives that are required for professional planners and the extent to which this has been internalised in role definitions. Whether these perspectives have been obtained or not is taken up again hereafter.

Integration of Education in Regional Planning

This study has described mechanisms for participation in educational planning. Progression to inter-sectoral planning appears to be yet only in the formative stages of development.

Structures for integration. Mechanisms for participation and integration require a different approach from that traditionally adopted by professional planners. The extent to which clients are excluded from, or are external to, the decision-making structure is considered in a "Proposed Regional Planning Model" below. Eide (OECD, 1974, p.253) however, takes up this issue:

> "Planning is inherently linked to decisions and must occur where real decisions are made. Participation thus means that planning cannot be a monopoly for a group of specialists or specialized agencies; it must be performed by all groups and individuals participating in decisions."

Apparently sophisticated "planning techniques" may also be used to exclude clients from understanding the advice provided by planners (OECD, 1974, p.254).

The fundamental issue in relation to organisational structures and inter-sectoral planning is that there needs to be a mechanism which is stated, understood and accepted at all levels of participation rather than relying on an assumption that planners "get together" or "talk to one another". No such mechanism is obvious in the Albury-Wodonga model.

Perspectives on inter-sectoral planning. In this study doubts were raised by some about the level of awareness of ideas based on shared use of community facilities, extended use of resources such as school buildings and increased rationalisation of government services. Implications that could be considered in more detail centre on the extent to which professional planners have been exposed to such concepts in their initial undergraduate programmes and subsequent in-service training, and the role of regional planning authorities in facilitating or providing for inter-agency co-ordination.

Regional entity. The process of providing for participation at regional level and the consequent identification of needs which are perceived to be unique to that region encourages examination of educational structures at least which have been constructed over a period of time when such requirements were not considered. Participation in educational planning and inter-sectoral planning immediately questions the relevance of centralised and strictly specialised government agencies. Can separate government departments in such areas as education, welfare and health be justified? In education, consideration could be given to the feasibility of a regional entity similar to the Local Education Authorities of the United Kingdom. On the Albury-Wodonga scene, co-ordination of education involving two separate state systems is fraught with difficulties.

2. Proposed Regional Planning Model

A study such as this is not an appropriate forum in which to develop a planning model. However, in this final section brief speculation based on the observations of Albury-Wodonga could be an appropriate conclusion. Features of the model are illustrated in Figure 4, and may be summarised as follows:

i) Professional planners and administrative staff of the regional development body are clearly identified as providing a support service;

ii) Co-operation between community-based groups and the responsible government agency (for example in education) is ensured through a formally structured unit within the framework of the development organisation. This inter-agency planning unit also could have the facility to formally engage in inter-sectoral planning;

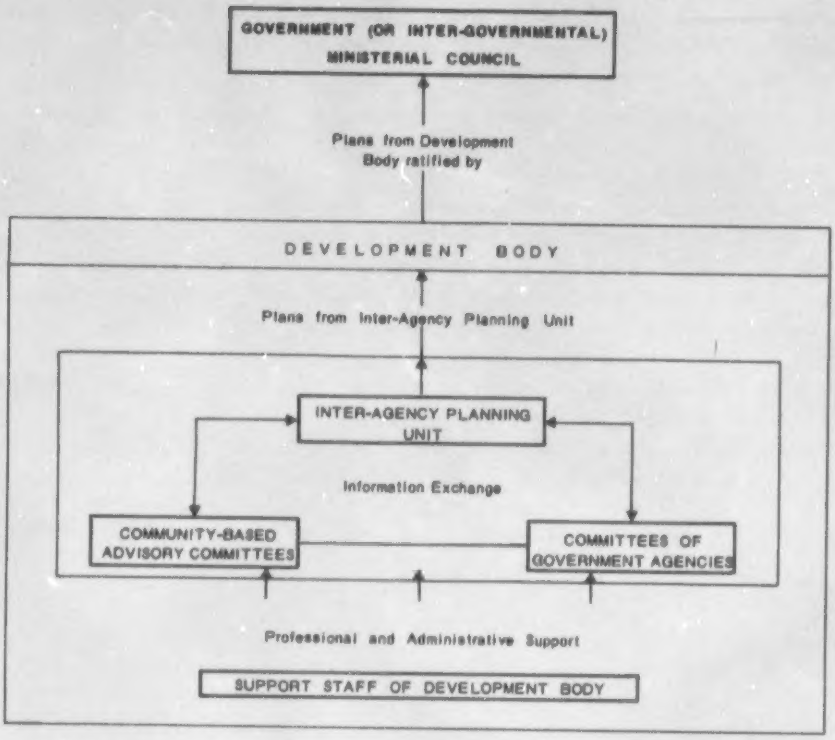
iii) While the inclusion of community-based committees and representatives of government agencies within the domain of "professional planners" does challenge perceptions of isolation of planning from the needs of clients, it also ensures that, before plans are ratified, they are required to be filtered by a planning process oriented to participation and integration.

3. Significance

The Albury-Wodonga Development Corporation has existed for almost three years. In that time, changes in government and increasing economic constraints have created uncertainties, affected morale and imposed delays. Although confidence has been restored in the Corporation as a result of continued government funding, the limited time span of this regional planning project underlines the need to be cautious about premature observations of its success or failure.

The observation that can be confidently stated is that the Albury-Wodonga Development Corporation is a pilot project of national significance which will influence and provide motivation for subsequent regional planning strategies.

Figure 4. **PROPOSED REGIONAL PLANNING MODEL**


GOVERNMENT (OR INTER-GOVERNMENTAL) MINISTERIAL COUNCIL
Plans from Development Body ratified by
DEVELOPMENT BODY
Plans from Inter-Agency Planning Unit
INTER-AGENCY PLANNING UNIT
Information Exchange
COMMUNITY-BASED ADVISORY COMMITTEES
COMMITTEES OF GOVERNMENT AGENCIES
Professional and Administrative Support
SUPPORT STAFF OF DEVELOPMENT BODY

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Résumé du rapport technique n° 2

PLANIFICATION ET REALISATION DE LA PARTICIPATION A L'ENSEIGNEMENT DANS LA REGION D'ALBURY-WODONGA EN AUSTRALIE

par

R. Chapman et J. Burkhardt

La région d'Albury-Wodonga est située dans la partie densément peuplée du sud-est de l'Australie, sur le principal couloir de communications entre Sydney et Melbourne. En octobre 1973, elle a été officiellement désignée comme site d'une importante ville nouvelle de 300 000 habitants. Elle constitue un projet-pilote de première importance pour la décentralisation et le développement régional. L'étude examine la planification et l'implantation des équipements éducatifs dans cette région.

Le gouvernement fédéral australien et les gouvernements des états de Nouvelles-Galles-du-Sud et de Victoria se partagent la responsabilité du projet, mais sa mise en oeuvre, son contrôle et son exécution relèvent de l'Agence de Développement de l'Albury-Wodonga (AWDC), assistée de comités de coordination des bureaux fédéraux et de l'état (désignés collectivement sous le nom "Government Officials Committee") et par un Conseil consultatif représentant les intérêts communautaires et comprenant un Comité consultatif de l'éducation. L'objectif principal de l'Agence est d'assurer le développement d'une ville et d'une région dynamiques, qui fourniront à leurs habitants des possibilités réelles de logement, d'emploi, d'éducation, de soins de santé, de loisirs, d'excellents services humains et sociaux, un environnement salubre et la participation effective aux décisions qui les concernent.

CONCEPTIONS DU ROLE DE L'ENSEIGNEMENT DANS LE DEVELOPPEMENT REGIONAL

L'enseignement est censé contribuer au développement régional dans trois domaines principaux :

1. Développement personnel : L'Agence de développement affirme la nécessité de lier l'éducation au développement individuel et communautaire.

2. Développement communautaire : l'école est également présentée comme un facteur clé du développement social de la population :

   - non seulement lorsqu'elle fournit des services d'enseignement formel, mais aussi lorsqu'elle s'intègre à d'autres services sociaux, récréatifs et culturels offerts à l'ensemble du public ;
   - comme foyer communautaire naturel, auquel participent obligatoirement de nombreuses personnes et qui peut créer une identité locale.

   L'Agence AWDC considère que des possibilités et des services d'éducation de la plus haute qualité sont absolument nécessaires pour attirer vers la région des gens des grandes villes.

3. Développement économique : l'enseignement de niveau primaire et secondaire créera un certain nombre d'emplois dans la région et l'enseignement supérieur, en particulier la création d'une université, sera une importante source d'emplois.

LE ROLE DE L'ENSEIGNEMENT DANS LE DEVELOPPEMENT DE L'ALBURY-WODONGA

L'Agence AWDC est responsable de la planification de l'enseignement dans la région ; elle est aidée à cette fin par deux sous-comités, à savoir le Government Officials Committee et l'Advisory Committee on Education, qui émanent du Conseil consultatif. Comme on juge important de relier l'enseignement à son environnement, les membres de ces deux comités proviennent de milieux professionnels et groupes d'intérêts divers. En vue d'établir un plan stratégique général pour doter la région de services scolaires, une étude détaillée fut entreprise par le Comité consultatif de l'éducation. Le Government Officials Committee a accueilli le rapport final, "Education for Baranduda" (Pettit, 1976), non seulement comme convenant pour la planification effective de services d'éducation dans l'Albury-Wodonga, mais aussi comme constituant "un modèle pour toute étude régionale sur l'école en Australie". Le rapport recommandait un système d'écoles primaires, moyennes et supérieures, les écoles primaires et moyennes devant être implantées dans un même site et "être un foyer fournissant au voisinage de nombreux moyens pédagogiques à proximité du centre d'activités". L'école supérieure devrait être située en milieu urbain, "contribuer à sa vitalité et développer les services communautaires dont elle usera", être "un centre spécial de ressources éducatives accessible aux personnes de tous âges". Malgré quelques réserves des gouvernements des états qui souhaiteraient approfondir les conséquences du rapport sur leurs systèmes éducatifs, celui-ci a été bien accueilli et adopté par l'Agence de développement AWDC "comme base d'une planification préliminaire".

Participation à la planification de l'enseignement dans la région d'Albury-Wodonga

Dès le début, on a érigé en principe la participation du public intéressé en ce qui concerne tant le droit à l'information sur les décisions à prendre que celui d'intervenir dans ces dernières. L'information a été réunie par les ministères impliqués dans la planification de l'éducation, les comités consultatifs locaux, l'Agence de développement et des consultants venant des milieux de l'enseignement. En outre, la procédure de la consultation a été utilisée pour favoriser la discussion libre, la compréhension et l'établissement de priorités. Bien qu'il existe certains obstacles à ce processus de planification de la participation, notamment une acceptation insuffisante du concept de participation de la communauté à l'éducation et une confusion au sujet des tâches et des relations entre le Comité consultatif et les "Government Officials Committees", on peut conclure que la région a largement bénéficié de ce système de participation communautaire : grâce à lui, cette participation s'est développée, les objectifs de l'éducation ont été clarifiés et la coordination entre divers organismes a été améliorée.

Intégration de l'enseignement dans la planification globale

Un mécanisme spécial, le Groupe de coordination régionale de l'Albury-Wodonga, a été mis en place pour faciliter la coordination entre les administrations. Malgré des difficultés initiales en matière d'organisation, le Groupe a très bien réussi à intégrer les comités d'enseignement des communautés et des gouvernements dans la planification globale de la région.

CONDITIONS DE LA POLITIQUE ET DE LA PLANIFICATION FUTURES

1. En ce qui concerne la participation à la planification de l'enseignement :

   - les structures formelles de participation devraient être établies avec plus de soin et être soumises à une révision permanente;
   - afin d'éviter toute contestation, des procédures de participation devraient être établies au niveau central comme au niveau régional;
   - les objectifs de participation avancés par les planificateurs professionnels devraient être soigneusement analysés.

2. En ce qui concerne l'intégration de la planification de l'éducation à la planification régionale :

- les mécanismes de participation devraient inclure l'utilisateur également dans les structures de décision;
- au cours de leur formation initiale et complémentaire, les planificateurs devraient être initiés à la coordination interadministrative et à la participation aux services communautaires;
- des organismes régionaux (semblables aux autorités locales de l'éducation du Royaume-Uni) conviendraient peut-être mieux que les actuels bureaux gouvernementaux, centralisés et strictement spécialisés, pour assurer la participation et identifier les besoins locaux.

A partir de l'expérience de la région d'Albury-Wodonga, les auteurs terminent leur étude en proposant un modèle de planification régionale et en soulignant l'importance de cette expérience pour la stratégie future de planification régionale en Australie.

Rapport technique N° 3

LA PLACE DE L'ENSEIGNEMENT DANS LA POLITIQUE DE DEVELOPPEMENT REGIONAL EN FRANCE

par

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I. UNE ORGANISATION CENTRALISEE DE L'EDUCATION A RENDU DIFFICILEMENT POSSIBLE UNE PARTICIPATION VOLONTARISTE ET DIFFERENCIEE DE L'ENSEIGNEMENT AU DEVELOPPEMENT REGIONAL 84

II. L'EVEIL AUX PROBLEMES DES DISPARITES REGIONALES A FAIT PROGRESSIVEMENT APPARAITRE LA NECESSITE DE L'AMENAGEMENT DU TERRITOIRE ET D'UNE REFLEXION SUR LA CONTRIBUTION POSSIBLE DE L'ENSEIGNEMENT AUX POLITIQUES DE DEVELOPPEMENT REGIONAL 87

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Participer au développement régional est-il un des objectifs de l'enseignement en France? La question mérite d'être posée car elle fait apparaître immédiatement un certain nombre de caractéristiques des buts assignés en France à l'enseignement et à son organisation.

L'enseignement, tel qu'il est conçu en France, résulte de deux courants de pensée, historiquement convergents. Le premier de ces courants consiste à faire de l'éducation conçue au niveau central un facteur d'unité nationale, en particulier pour ce qui est de la formation des élites. Une telle perspective était celle de Napoléon Ier qui s'était attaché particulièrement à l'organisation de l'enseignement secondaire avec l'implantation rationnelle et systématique des lycées et des collèges, et de l'enseignement supérieur avec une sérieuse tutelle exercée sur les universités.

Le second courant a consisté à poursuivre l'objectif de démocratisation de l'enseignement, puis d'égalisation des chances entre tous les jeunes Français, quelle que soit leur condition sociale et quelle que soit leur origine géographique. Les grandes étapes de la réalisation de cet objectif ont été la loi du 28 mars 1882 de Jules Ferry rendant l'enseignement primaire obligatoire et laïque, puis, en 1959, l'ordonnance du 6 janvier 1959 prise par le Général de Gaulle, portant la scolarité obligatoire jusqu'à 16 ans révolus. La première loi a eu pour effet de permettre à tous les Français d'accéder à l'enseignement primaire, la seconde de rendre l'enseignement du second degré obligatoire pour tous jusqu'à la classe de troisième.

Ces deux objectifs n'ont semblé pendant longtemps être accessibles qu'au travers d'une organisation centralisée de l'enseignement dans laquelle les aspects régionaux étaient le plus souvent négligés. Ce sera l'objet de la première partie.

Cependant l'éveil aux problèmes des disparités régionales a fait progressivement apparaître la nécessité d'un aménagement du territoire et a conduit à une réflexion sur la contribution possible de l'enseignement à cette action. Ce sera l'objet de la seconde partie. Le cas particulier de la situation du Massif Central fournira une illustration qui sera développée dans la troisième partie.

I. UNE ORGANISATION CENTRALISEE DE L'EDUCATION A RENDU DIFFICILEMENT POSSIBLE UNE PARTICIPATION VOLONTARISTE ET DIFFERENCIEE DE L'ENSEIGNEMENT AU DEVELOPPEMENT REGIONAL

Le terme de "région" n'a retrouvé une signification administrative, en France, qu'en 1964 avec le décret du 14 mars créant les préfets de région et les commissions de développement économique régional placées auprès d'eux. Cette évolution a été renforcée par la loi du 5 juillet 1972 organisant les régions avec une assemblée régionale et un comité économique et social régional. En effet, d'une certaine façon, l'histoire de la France depuis les Capétiens peut s'analyser comme la lutte d'un pouvoir centralisé, implanté à Paris, contre l'indépendance des régions, jusqu'en 1789, et même contre leur simple autonomie avec la victoire des jacobins, partisans d'un Etat centralisé fort, sur les girondins fédéralistes sous la Révolution. Le terme de "région" disparut et la république, puis l'empire, créèrent et organisèrent le département, unité administrative de taille restreinte fabriquée de toutes pièces.

Bien qu'en 1871 le département ait été doté d'une assemblée départementale, le conseil général, démocratiquement élu, il n'a jamais pu être en mesure de s'affirmer comme une entité véritablement autonome vis-à-vis du pouvoir central. C'est ainsi que les ordres venaient de Paris et que les différents échelons administratifs implantés sur le territoire étaient chargés de les faire exécuter et d'exercer une tutelle étroite sur les collectivités locales, communes et départements.

Le cas de l'enseignement n'était guère différent bien que, du fait de l'histoire, son organisation ait été relativement différente.

A la tête de l'administration de l'Education se trouve le ministre qui, jusqu'à une date récente (1974), exerçait son autorité à la fois sur les enseignements primaire, secondaire et supérieur. Le ministre dispose d'une administration centrale chargée de préparer et de faire appliquer ses décisions et d'une inspection générale, dont la mission consiste à en contrôler l'exécution sur le plan à la fois pédagogique et administratif.

Au niveau local, l'organisation administrative de l'éducation est originale avec les académies comprenant un nombre entier de départements. On en compte aujourd'hui vingt-six, y compris l'académie des Antilles-Guyane. A la tête de chaque académie se trouve le recteur, qui est représenté dans les départements par un inspecteur d'académie.

La répartition des pouvoirs entre les différents niveaux hiérarchiques ne laisse qu'une marge d'initiative limitée aux responsables locaux pour définir une véritable politique régionale de l'éducation.

C'est le ministre qui définit les programmes d'enseignement et qui détermine l'organisation pédagogique des établissements. Sur le plan financier, les enseignants sont des fonctionnaires de l'Etat, le budget de l'Etat prend également en charge l'essentiel des coûts de construction et de fonctionnement des établissements.

Les pouvoirs des recteurs et des inspecteurs d'académie consistent surtout à décider la façon dont les mesures prises par le ministre seront appliquées dans leur circonscription. Il faut noter cependant que, pour le premier degré, les communes et les départements se sont vu confier par la loi de 1886 d'assez larges responsabilités sur le plan de l'organisation matérielle. Ce sont en particulier les communes qui pourvoient à la construction et à l'entretien des écoles maternelles et élémentaires.

On peut trouver une bonne illustration de la centralisation qui préside à l'élaboration d'une politique de l'éducation dans le mécanisme de la carte scolaire. La carte scolaire est l'instrument qui permet de traduire matériellement sur l'ensemble du territoire le projet pédagogique défini par le ministre ainsi que ses modalités d'application. Le décret du 11 juin 1971 la définit ainsi: "La carte scolaire de l'enseignement public du second degré figure le réseau des établissements publics arrêté par le ministre de l'Education nationale, sur proposition des recteurs, après avis des commissions académiques de la carte scolaire...". Les propositions des recteurs sont soigneusement encadrées par des directives précises.

Sur le plan de la pédagogie, le déroulement et le contenu des études générales ou technologiques sont définis par le ministre sans qu'aucune modification locale ne soit possible.

De leur côté, les flux d'élèves à accueillir sont fixés au niveau national avec des marges d'adaptation relativement étroites laissées à l'appréciation des recteurs.

C'est ainsi que pour les enseignements de second cycle, la répartition à l'intérieur des niveaux d'enseignement doit obéir aux normes théoriques présentées dans le tableau 1.

Enfin, en ce qui concerne les immeubles destinés à accueillir les élèves, des tailles types ont été définies qui correspondent en général à des modèles de construction : pour les collèges, quatre types de collège sont proposés (dont les capacités d'accueil sont de 400, 600, 900 ou 1 200 élèves). Pour les collèges d'enseignement technique, les capacités d'accueil sont des multiples de 108 avec des modèles de 324, 432, 540 et 648 élèves.

Tableau 1

REPARTITION DES FLUX D'ELEVES A L'INTERIEUR DES NIVEAUX D'ENSEIGNEMENT

a) de second cycle long (lycées)

Taux global*	Enseignement	Taux moyens	Marge d'action des autorités régionales
42 %	- Formations générales	47 %	42 % à 52 %
	- Formations technologiques industrielles	23 %	21 % à 25 %
	- Formations technologiques tertiaires	30 %	27 % à 33 %
		100 %	

b) de second cycle court (collèges d'enseignement technique)

Taux global*	Enseignement	Taux moyens	Marge d'action des autorités régionales
48 %	- Formations technologiques industrielles	60 %	55 % à 65 %
	- Formations technologiques tertiaires	40 %	35 % à 45 %

* Les 10 % restants correspondent aux départs vers la vie active, aux inadaptés et à l'apprentissage.

Ce système aboutit notamment à prévoir la suppression d'établissements de dimension réduite, ce qui peut comporter certains inconvénients pour le milieu rural.

Il faut noter que la Commission académique de la carte scolaire, créée en 1964 pour donner au recteur un avis sur les propositions qu'il adresse au ministre, ne comprend des représentants des conseils généraux que depuis 1971 ; aucun représentant de la région n'y siège. On y trouve cependant des membres des chambres consulaires et surtout des fonctionnaires et des syndicalistes.

La carte scolaire apparaît donc comme un puissant instrument de planification, mais elle laisse une place assez réduite aux instances élues dans la définition d'une véritable politique régionale de l'enseignement. Elle illustre bien une conception centralisée du développement de l'éducation où les échelons régionaux et départementaux sont essentiellement chargés de traduire sur le terrain les instructions du ministre.

La situation ainsi décrite a cependant notablement évolué depuis quelques années avec un accroissement sensible des responsabilités au niveau régional.

II. L'EVEIL AUX PROBLEMES DES DISPARITES REGIONALES A FAIT PROGRESSIVEMENT APPARAITRE LA NECESSITE DE L'AMENAGEMENT DU TERRITOIRE ET D'UNE REFLEXION SUR LA CONTRIBUTION POSSIBLE DE L'ENSEIGNEMENT AUX POLITIQUES DE DEVELOPPEMENT REGIONAL

Divers indicateurs permettent de mesurer les disparités régionales en France. Nous n'en citerons que deux - la population et le revenu par habitant - pour illustrer notre propos. Si l'on divise schématiquement la France en trois régions : la Région parisienne, l'Est et l'Ouest, avec une ligne de partage entre ces deux dernières régions qui irait de l'estuaire de la Seine au delta du Rhône en suivant les limites administratives des régions, on aboutit aux résultats du tableau 2.

Tableau 2

REPARTITION ET EVOLUTION DE LA POPULATION TOTALE
SELON LES REGIONS

	Effectif en milliers d'habitants				Taux d'évolution annuelle moyen sur la période en %		
	1954	1962	1968	1974	54.62	62.68	68.74
Régions de l'Ouest	16 700	17 312	18 183	18 762	+ 0,4	+ 0,6	+ 0,5
Régions de l'Est	18 958	20 738	22 345	23 556	+ 1,1	+ 1,2	+ 0,9
Région parisienne	7 376	8 470	9 251	10 022	+ 1,7	+ 1,5	+ 1,3
Ensemble	43 034	46 520	49 779	52 340	+ 1,0	+ 1,1	+ 0,8

A un niveau plus fin on note que la croissance démographique a bénéficié essentiellement aux villes qui ont progressé de 1,8 % par an entre 1962 et 1968 et de 1,6 % entre 1968 et 1975, alors que les communes rurales perdaient 0,6 % de leur population entre 1962 et 1968 et 0,4 % entre 1968 et 1975.

Tableau 3

REPARTITION DU REVENU DISPONIBLE PAR HABITANT
FRANCE ENTIERE = 100

	1962	1970
Régions de l'Ouest	83,4	89,1
Régions de l'Est	96,8	94,4
Région parisienne	141,5	133,1
Ensemble	100	100

La réduction récente mais insuffisante des disparités est à mettre au crédit de l'industrialisation de l'Ouest de la France.

La prise de conscience de ces phénomènes à partir de 1950, mais surtout depuis 1960, a conduit à deux types de politiques qui concourent au même objectif de développement régional : la mise en place de structures régionales aux pouvoirs élargis et le lancement d'actions spécifiques d'aménagement du territoire.

Cet exposé n'est pas le lieu de longs développements sur ces deux thèmes ; il convient cependant d'en préciser les principales étapes.

1. La mise en place de structures régionales aux pouvoirs élargis

On note l'évolution suivante : le décret du 2 juin 1960 crée les 21 circonscriptions d'action régionale. Le décret du 14 mars 1964 le complète en adoptant la dénomination de région et en donnant aux préfets de région un pouvoir de coordination des différentes administrations, notamment dans le domaine des investissements et de l'action économique.

Le préfet de région, auprès de qui siège la Commission de développement économique régional, est ainsi le véritable maître d'oeuvre de la politique de développement régional. Le décret du 13 novembre 1970 a largement accru le volume des crédits de l'Etat dont il a la charge de programmer l'utilisation.

Enfin la loi du 5 juillet 1972 a créé les établissements publics régionaux (EPR) dotés de deux assemblées, le conseil régional et le comité économique et social. L'EPR dispose de ressources fiscales dans la limite de 35 F par habitant et vote un budget, consacré exclusivement au financement d'investissements publics.

Il s'agit donc d'une évolution intéressante visant à susciter progressivement une prise en charge des régions par elles-mêmes.

Il faut s'attarder quelques instants sur l'effort que le ministère de l'Education a accompli pour accompagner ce mouvement de déconcentration et de décentralisation.

Les pouvoirs des recteurs ont été notablement augmentés, plus spécialement pour ce qui est de la tutelle sur les établissements publics d'enseignement et la gestion de certaines catégories de personnel enseignant et de personnel administratif.

En ce qui concerne les investissements, la quasi-totalité des équipements du ministère de l'Education sont aujourd'hui programmés par les préfets de région qui ont ainsi, après discussion avec les assemblées régionales, la possibilité de déterminer la part à réserver à tel ou tel type de construction, ce qui implique déjà une amorce de choix de développement, notamment lorsqu'il s'agit des enseignements technologiques. Il faut d'ailleurs noter que certaines régions ont proposé de financer des constructions scolaires sur leurs ressources propres, au bénéfice en particulier des collèges d'enseignement technique.

Enfin il est envisagé de donner aux recteurs le pouvoir d'arrêter la carte scolaire, après une consultation plus large des instances régionales afin de permettre la prise en compte des options de développement régional. Une telle décision implique évidemment que l'on trouve à ce niveau des instances capables de définir des objectifs régionaux et de les traduire en besoins de formation. Il y a là un problème technique qu'il ne faut pas négliger.(1)

2. Le lancement d'actions spécifiques d'aménagement du territoire par la Délégation à l'Aménagement du Territoire et à l'Action Régionale (DATAR)

On peut distinguer divers types d'actions qui, d'ailleurs, se combinent souvent :

- la mise en place d'une armature urbaine harmonieuse. Il s'agit, dans un premier temps, de faire contrepoids à Paris par la constitution de huit métropoles d'équilibre, dotées des grands équipements publics et privés, de nature à en faire des pôles de développement à l'échelle européenne. Ce fut ensuite la politique des villes moyennes et petites, destinée notamment à éviter des migrations trop importantes vers les grandes métropoles;
- les politiques d'implantation des activités économiques sur l'ensemble du territoire. L'instrument essentiel dans ce domaine sont les primes de développement dont bénéficient les entrepreneurs qui acceptent de développer leurs activités dans les zones dépressives en particulier au regard de l'emploi;
- des politiques de zones. Elles s'appliquent soit à des régions qui rencontrent des difficultés importantes sur le plan économique du fait des reconversions nécessaires (Lorraine, Nord-Pas-de-Calais), soit à des régions qui apparaissent sous-développées par comparaison avec la moyenne nationale (Bretagne, Pyrénées, Vosges-Jura par exemple). Le Massif Central a fait l'objet d'un plan particulier de développement mis en oeuvre à partir de 1975. Ce plan apparaît comme un bon exemple de ce type de politique, compte tenu de son ampleur et aussi de la part que l'enseignement y a prise.

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1) Cette question est analysée dans le Rapport technique n° 7.

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III. LA PLACE DE L'ENSEIGNEMENT DANS LA POLITIQUE DE DEVELOPPEMENT DU MASSIF CENTRAL

1. Un programme de développement global de cette région naturelle

Le Massif Central n'est pas une région au sens administratif du terme mais une zone géographique englobant 10 départements dans leur totalité et 7 partiellement. Les régions Auvergne et Limousin sont totalement incluses dans le périmètre du Massif Central alors que les régions Midi-Pyrénées, Languedoc-Roussillon et Rhône-Alpes ne le sont qu'en partie. Il couvre 73 582 Km2 soit 13,3 % du territoire national, sa population est passée de 2 949 000 habitants en 1968 à 2 937 000 en 1975 soit une diminution de 0,4 % alors que dans le même temps la population française progressait de 5,7 %. De vastes zones se dépeuplent de façon inquiétante. Il s'agit donc d'une région déprimée qui perd sa jeunesse et qui relève d'un traitement particulier de l'Etat.

Les grandes lignes de ce programme ont été définies par le Président de la République lors d'une allocution au conseil régional d'Auvergne au Puy-en-Velay (Haute-Loire) le 29 septembre 1975 ; il semble intéressant d'en rappeler les aspects essentiels afin de mieux saisir le contexte dans lequel s'inscrit l'effort du ministère de l'Education. Le plan comporte trois rubriques :

i) La traversée du Massif Central et son désenclavement. Dans ce domaine, l'effort porte sur les points suivants :

- permettre la traversée du Massif Central par une voie sur plate-forme autoroutière dans la direction Nord-Sud. Un maillage routier d'ensemble est également prévu ;
- renforcer les transports ferroviaires : le but principal est de réduire sensiblement la durée de trajet sur le parcours Paris-Clermont-Ferrand ;
- améliorer les dessertes aériennes locales notamment en Haute-Loire et Cantal.

ii) La mise en valeur optimale des ressources du Massif Central en utilisant les atouts remarquables dont il dispose, en insistant particulièrement sur l'élevage et la possibilité de valoriser sur place les produits de la terre. Un effort spécifique sera consenti pour la mise en culture des terres en friche afin de permettre aux jeunes d'accroître la superficie de leurs exploitations. Il conviendra également de tirer un meilleur parti de la ressource précieuse que constitue la forêt. L'objectif doit être un doublement en quinze ans de la production forestière du Massif Central, ce qui contribuera à l'équilibre des échanges extérieurs.

Le second atout du Massif Central est son aptitude à accueillir et à développer les activités artisanales et industrielles.

Grâce notamment à un système de primes d'incitation on espère, à terme, faire passer le nombre d'emplois dans l'artisanat de 200 000 à 400 000.

En ce qui concerne l'industrie, le Massif Central bénéficiera du régime le plus favorable d'aide en privilégiant les implantations industrielles dans les villes petites et moyennes.

Enfin, un plan d'aménagement touristique du Massif Central doit permettre de tirer le meilleur parti de la qualité des sites et du paysage ainsi que des ressources du thermalisme.

iii) Amélioration des conditions de vie des habitants de la région.

Dans ce domaine, à côté du développement de l'équipement téléphonique et de la suppression des zones d'ombre de télévision, le Président indique qu'il faut également porter une attention particulière à la question difficile du maintien de la qualité des services publics en milieu rural. La qualité de ces services veut d'abord qu'ils s'y maintiennent.

Le passage intéressant l'enseignement doit être cité en entier : "Il faut porter une attention particulière au domaine de la préscolarisation et de l'enseignement primaire afin que, dès le plus jeune âge, les enfants des populations isolées ou ceux de la montagne bénéficient à l'école des chances culturelles et d'éducation égales à celles des enfants de la plaine et des villes. J'ai demandé au ministre de l'Education, ancien recteur de l'académie, d'y veiller et, notamment, d'étudier les moyens d'innover dans le domaine de la pédagogie et de l'aménagement du temps scolaire, et d'alléger les charges des parents d'élèves et des collectivités locales en matière de transport scolaire."

On notera que le plan de développement du Massif Central est global ce qui, du point de vue de l'éducation, est particulièrement intéressant car cela permet d'envisager des mesures à long terme alors que la tendance précédente avait été plutôt de colmater les brèches devant un exode rural considéré comme inexorable.

2. La contribution du ministère de l'Education à ce programme

Devant l'invitation à agir qui lui était faite, le ministère de l'Education a tout d'abord eu à se demander quelle était la situation du Massif Central sur le plan de la scolarisation des jeunes à tous les niveaux. Les données n'étant disponibles qu'au plan départemental, on citera uniquement les chiffres qui concernent les dix départements entièrement compris dans le périmètre Massif Central, en choisissant quelques indicateurs pour chaque niveau d'enseignement.

1) L'enseignement pré-élémentaire

Le taux de scolarisation dans l'enseignement pré-élémentaire de 2 à 5 ans montre que la dispersion est relativement faible autour de la moyenne nationale, les départements les plus ruraux (Lozère, Haute-Loire) n'étant pas les moins bien situés (Tableau 4).

Tableau 4

L'ENSEIGNEMENT PRE-ELEMENTAIRE

Taux de scolarisation dans l'enseignement pré-élémentaire de 2 à 5 ans - 1974/75 - Public + Privé		Part des effectifs en sections enfantines par rapport à la population de l'enseignement pré-élémentaire - 1973/74
Académie de Clermont		
Allier	64,2 %	14 %
Cantal	64,2 %	25 %
Haute-Loire	78,4 %	20 %
Puy-de-Dôme	71,4 %	9 %
Académie de Limoges		
Corrèze	77,5 %	14 %
Creuse	62,3 %	20 %
Haute-Vienne	62,7 %	14 %
Départements		
Aveyron	82,9 %	25 %
Lozère	79,0 %	25 %
Lot	68,5 %	25 %
Moyenne nationale	71,6 %	7,7 %

En revanche, lorsque l'on considère dans quelles conditions est réalisée cette scolarisation pré-élémentaire, on constate que la part des sections enfantines est partout bien supérieure à la moyenne nationale. Il convient de rappeler ici qu'il existe trois modalités de scolarisation pré-élémentaire :

- l'école maternelle qui comprend au minimum une classe pour les "petits" (2-3 ans) et une classe pour les "grands" (4-5 ans) ;
- la classe enfantine qui dépend administrativement d'une école élémentaire mais qui est individualisée sur le plan pédagogique avec une institutrice affectée à plein temps à cette classe ;
- la section enfantine qui accueille les enfants de cinq ans dans la même classe que les élèves des classes primaires avec le même maître. On considère généralement que ce type de scolarisation ne permet pas une bonne application d'une pédagogie adaptée à l'âge considéré.

ii) L'enseignement élémentaire

L'indicateur choisi est celui de l'importance des écoles à classe unique(1) dans l'enseignement élémentaire en isolant les écoles de moins de 10 élèves. On mesure par ce moyen le poids de la ruralité du Massif Central et de la dispersion de la population avec, par exemple, pour la Lozère 87 % d'écoles à classe unique dont 85,8 % ont moins de 10 élèves (Tableau 5).

Tableau 5

IMPORTANCE DES ECOLES A CLASSE UNIQUE
DANS L'ENSEIGNEMENT PRIMAIRE

- 1974/75 - Public

Part des écoles à classe unique dans l'enseignement primaire		Dont écoles de moins de 10 élèves
Académie de Clermont-Ferrand	42 %	39,4 %
Allier	18 %	5,7 %
Cantal	5,2 %	47,1 %
Haute-Loire	64 %	52,7 %
Puy-de-Dôme	38 %	30,1 %
Académie de Limoges	29 %	
Corrèze	37 %	27,1 %
Creuse	29 %	13,7 %
Haute-Vienne	14 %	
Départements		
Aveyron	57 %	44,5 %
Lozère	87 %	85,8 %
Lot	58 %	31,9 %
France entière	27,2 %	20,9 %

iii) Les enseignements de second degré

En ce qui concerne le second degré, l'examen de divers indicateurs ne fait pas apparaître globalement une situation particulièrement remarquable des académies du Massif Central par comparaison avec la moyenne nationale.

Pour l'enseignement de premier cycle (collège) on a constaté les orientations suivantes à l'issue des classes de 5e, 4e et 3e (année scolaire 1973/74) (Tableau 6).

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1) La classe unique est la classe dans laquelle un seul instituteur enseigne à tous les enfants de 5 à 6 ans jusqu'à la fin de l'enseignement élémentaire.

Tableau 6

a) ORIENTATION A LA FIN DE LA CLASSE DE 5e

	4e	CPPN et CPA (1)	Redoublement	CAP-CEP (2)	Sorties	Total
Académie de Clermont-Ferrand	70,9	10,8	6,9	9,1	2,1	100
Académie de Limoges	71,9	7,5	8,1	11,2	1,1	100
France entière	68,2	9,9	6,3	13,5	1,9	100

b) ORIENTATION A LA FIN DE LA CLASSE DE 4e

	3e	CPPN et CPA (1)	Redoublement	CAP-CEP (2)	Sorties	Total
Académie de Clermont-Ferrand	82,8	8,6	8	4,7	-	100
Académie de Limoges	81,7	2,1	9,1	6,3	0,5	100
France entière	81,9	3,2	6,9	4,8	0,9	100

c) ORIENTATION A LA FIN DE LA CLASSE DE 3e

	Second cycle court	Second cycle long	CPPN et CPA (1)	Redoublement	Sorties	Total
Académie de Clermont-Ferrand	22,7	50,2	0,5	7,6	18,9	100
Académie de Limoges	26,3	50,9	0,6	9,8	12,2	100
France entière	21,4	51,3	0,4	7,2	19,7	100

1) Classe préprofessionnelle de niveaux et classe préparatoire à l'apprentissage. Ces deux types de classes doivent permettre l'entrée dès la fin de la scolarité obligatoire dans le secteur de l'apprentissage.

2) Certificat d'aptitude professionnelle et certificat d'enseignement professionnel. Les CAP se préparent en 2 ou 3 ans, le CEP en un an. Le niveau de qualification de ce dernier diplôme est faible.

A ce niveau on constate simplement une tendance plus accusée à privilégier une orientation vers le second cycle court.

En ce qui concerne les taux de succès au baccalauréat, on trouve pour les académies de Clermont (65,4) et Limoges (66,3) des taux très voisins du taux national (66,1) (année 1974).

Un point important mérite cependant d'être souligné : le nombre des élèves qui doivent recourir à l'internat est très nettement supérieur à la moyenne nationale, ce qui s'explique aisément par le relief, la rigueur du climat et la faible densité de la population.

Le tableau 7 montre bien la relation qui existe entre le caractère montagneux de certains départements, tels le Cantal ou la Lozère, et l'hébergement des élèves dans un internat ; tandis qu'à l'opposé, ce mode d'accueil prend une place beaucoup plus faible dans un département de plaine comme l'Allier.

Tableau 7

ENSEIGNEMENT PUBLIC DU SECOND DEGRE

POURCENTAGE D'INTERNES/EFFECTIFS GLOBAUX D'ELEVES

Massif Central	Nombre d'internes	Effectifs totaux	%
Clermont-Ferrand	16 926	90 056	18,8
Allier	3 262	28 677	11,4
Cantal	3 743	10 626	35,2
Haute Loire	3 140	9 840	31,9
Puy-de-Dôme	6 781	40 913	16,6
Limoges	12 101	55 937	21,6
Creuse	3 161	11 260	28,1
Corrèze	5 130	18 368	27,9
Haute-Vienne	3 810	26 309	14,5
Lot	3 125	10 973	33,9
Aveyron	4 117	15 419	26,7
Lozère	1 920	4 186	45,9
France entière	319 813	423 461	7,55

En fait, c'est surtout au problème de l'organisation du service public de l'éducation dans un milieu rural qu'on se trouve confronté dans le Massif Central.

Une des caractéristiques essentielles du Massif Central est en effet l'importance qu'y conservent les actifs agricoles dans la population active totale ainsi qu'il apparaît au tableau 8.

Tableau 8

COMPOSITION DE LA POPULATION ACTIVE

(en pourcentage)

	Agriculteurs exploitants	Salariés agricoles	Patrons de l'indust. et du commerce	Prof. lib. et cadres sup.	Cadres moyens	Employés	Ouvriers	Person. de service
Massif Central	27	4	11	2	7	9	31	4
Moyenne nationale	12,1	2,9	9,6	4,9	9,8	14,7	37,8	5,7

Source : INSEE, Recensement général de la population (1968).

La population active agricole a, dans le Massif Central, une part deux fois plus importante que dans le reste du pays.

Cette situation, combinée avec une densité moyenne de population (40 habitants/Km2) nettement plus faible que la moyenne nationale (96 habitants/Km2) et une très grande dispersion de l'habitat, montre bien les caractéristiques des problèmes à résoudre.

Sur le plan proprement scolaire, les types d'établissement que l'on rencontre en milieu urbain et en milieu rural sont d'ailleurs assez différents dans le premier cycle du second degré. C'est ainsi que jusqu'à la mise en oeuvre de la réforme du système éducatif (Loi du 11 juillet 1975), on distinguait les collèges d'enseignement secondaire comportant trois filières de formation et les collèges d'enseignement général avec simplement deux filières. Cela se traduisait dans la pratique par le fait que les professeurs dotés des diplômes les plus élevés (certifiés et agrégés) n'étaient pas affectés dans les collèges d'enseignement général.

Une enquête effectuée sur l'année 1974/75 auprès de soixante établissements du premier cycle du second degré du Puy-de-Dôme a permis d'appréhender les résultats d'une telle pratique. Un des résultats le plus caractéristique de cette enquête a été le suivant : il montre les différences d'orientation entre le cycle court et le cycle long à la fin de la troisième (Tableau 9).

Tableau 9

ORIENTATIONS A LA FIN DU 1ER CYCLE SECONDAIRE

	Collèges d'enseignement général (CEG)	Collèges d'enseignement secondaire (CES)
Cycle court	42,1 %	23,6 %
Cycle long	39,7 %	64,0 %
Apprentissage et vie active	8,3 %	2,8 %
Autres situations	9,9 %	9,6 %
	100	100

Une étude plus détaillée entreprise dans le district scolaire d'Issoire devrait permettre de mieux saisir les causes de ces disparités. A priori, on peut en citer quelques-unes, mais sans pouvoir évaluer leur poids relatif : origine socio-professionnelle, fréquentation d'une classe maternelle, scolarisation ou non dans une école à classe unique, et enfin, type d'établissement du second degré où s'est déroulée la scolarité. L'enquête actuellement en cours n'a pas encore été dépouillée.

- Les travaux d'un groupe de réflexion

Face à la situation que nous venons de décrire, il convenait de s'interroger sur les solutions qu'il était possible d'envisager. Un groupe de travail a été chargé d'examiner cette question sous l'égide du recteur de Clermont-Ferrand et avec la participation de tous les recteurs des académies concernées, des inspecteurs d'académie et aussi des enseignants et des usagers. Les orientations préconisées par ce groupe de travail doivent être rappelées en distinguant les différents niveaux d'enseignement.

- Enseignement pré-élémentaire et élémentaire. Nous avons vu plus haut que le Massif Central est caractérisé dans ce domaine par le faible taux de scolarisation en classes maternelles et enfantines et l'importance des écoles à classe unique. Le groupe de travail a estimé que la meilleure solution que l'on pouvait apporter à ce problème consistait à préconiser le regroupement pédagogique intercommunal (RPI). Cette formule consiste à organiser entre différentes communes disposant d'écoles à classe unique, une sorte de coopérative scolaire permettant d'établir un véritable enseignement par niveau. Cette organisation permet le plus généralement de créer une classe enfantine regroupant les enfants des sections enfantines. On distingue deux types de RPI, les RPI concentrés où tous les enfants sont regroupés dans la commune centrale. et les RPI dispersés où chaque commune conserve son école, celle-ci étant spécialisée sur un des niveaux, de la classe enfantine au cours moyen. Cette dernière formule permet de maintenir l'école dans le village et ainsi de vaincre la réticence des maires et des familles.

Toutefois, cette formule intéressante ne peut pas être appliquée dans tous les cas ; le maintien de la classe unique reste indispensable lorsque la rigueur du climat ou la longueur des trajets ne permettent pas d'envisager de déplacer quotidiennement de jeunes enfants.

Cependant, il convient de rechercher des solutions pour permettre un minimum de scolarisation des enfants d'âge maternel.

- La "classe à la ferme" a été expérimentée mais cette formule, séduisante en apparence, pose un problème de responsabilité et surtout suppose que la fermière ait reçu un minimum de formation.

- L'institutrice itinérante est responsable de deux ou trois sections enfantines fonctionnant dans des écoles à classe unique. Pendant quelques demi-journées par semaine, les élèves participent à des activités sous la responsabilité de l'institutrice spécialisée. Cette solution implique, d'une part, que soit aménagé un local pour la section enfantine à temps partiel et, d'autre part, que le maître titulaire de la classe unique accepte de collaborer avec la maîtresse itinérante, reprenant en son absence les activités et les exercices qu'elle aura proposés.

En ce qui concerne l'enseignement élémentaire, l'internat apparaît comme une solution extrême, qui ne peut se justifier que dans les conditions les plus rudes. Cet internat peut avoir un caractère partiel et n'être utilisé que pendant la mauvaise saison. En dehors des heures de cours, les enfants doivent être pris en charge par un personnel spécialisé capable de prolonger l'action de l'école et de se substituer à la famille.

A propos de l'enseignement du premier degré, le groupe de travail a noté que l'isolement des maîtres des écoles à classe unique est très durement ressenti par ceux-ci et que cette situation conduit à une rotation très rapide des instituteurs qui postulent pour des postes en ville ou dans des bourgades plus importantes. Dans tous les cas, il conviendrait de rechercher le moyen d'assurer le soutien pédagogique à ces enseignants pour qu'ils puissent améliorer la qualité de leur enseignement et disposer d'un réconfort moral. On verra plus loin qu'une expérience est en cours pour tenter de trouver une solution à ce problème.

Au niveau de l'enseignement du second degré, le groupe a évoqué la situation des petits CEG ruraux. Ces établissements sont souvent considérés comme une des causes principales de la qualité médiocre des résultats obtenus par les enfants du milieu rural. C'est pourquoi la carte scolaire avait prévu de supprimer une part importante de ces établissements lorsque les effectifs n'étaient pas assez nombreux. Cependant le groupe de travail a constaté que la loi du 11 juillet 1975 portant réforme au système éducatif, en supprimant la notion de filière et en créant un établissement de type unique, le collège, permettait d'introduire une pédagogie unique pour le milieu rural et le milieu urbain. Le groupe de travail a souhaité que cette situation nouvelle soit exploitée le plus vite possible, notamment en dotant ces établissements des mêmes types d'équipement que les collèges urbains.

En ce qui concerne l'enseignement technologique, le groupe a constaté que les établissements chargés de cet enseignement ne pouvaient pas être largement dispersés dans le milieu rural. Cette situation incite les jeunes :

- soit à quitter l'école sans formation professionnelle ;
- soit à rejoindre le collège d'enseignement technique (CET) ou le lycée le plus proche sans avoir fait un choix professionnel véritable ;
- soit à n'accepter qu'une formation technologique réduite, notamment dans les classes préparatoires à l'apprentissage.

Il a paru qu'une des solutions possibles consisterait à initier les jeunes à l'enseignement professionnel dès le premier cycle. Ici encore, les dispositions de la loi du 11 juillet 1975 qui introduit le travail manuel et technique dans l'enseignement des collèges sont de nature à résoudre ce problème.

- Les actions retenues par le ministre

Compte tenu de ce travail préparatoire et de l'état de la réflexion, le ministre de l'Education a pu, le 11 septembre 1975, définir les principales orientations de son action en faveur du Massif Central.

Cette action s'articule autour de quatre rubriques principales :

- l'adaptation du réseau d'établissements ;
- l'aide à la fréquentation scolaire ;
- l'adaptation pédagogique ;
- l'amélioration de la condition des enseignants en milieu rural d'altitude.

i) - Adapter le réseau d'établissements

Le réseau d'établissements primaires et secondaires que l'on trouve dans le Massif Central a été mis en place le plus souvent à partir de l'examen d'une situation démographique maintenant dépassée et selon des normes pédagogiques désormais inadaptées. Des adaptations sont donc nécessaires; elles doivent le plus souvent possible éviter de se traduire par des fermetures.

- Classes maternelles et élémentaires

La formule de la classe unique ne correspond plus aux nécessités pédagogiques actuelles ; elle ne permet pas de faire une place satisfaisante aux enfants des sections enfantines. Différentes formules de regroupement ont été expérimentées. Celle qui est plus fréquemment applicable, car elle a l'avantage de concilier les impératifs pédagogiques avec le maintien d'une classe dans chaque commune, consiste à spécialiser chaque école de village dans un niveau d'enseignement (maternelle, 6 et 7 ans, 8 et 9 ans, 10 et 11 ans).

- Collège

Il est demandé aux recteurs d'adapter la révision de la carte scolaire en fonction notamment de la décision de ne pas fermer les petits établissements ayant au moins 120 élèves dans les zones d'accès difficile.

Des aménagements qui n'avaient pas été réalisés, du fait des décisions de carte scolaire condamnant ces établissements, vont être nécessaires (salles polyvalentes, centre de documentation et d'information, etc.).

Les solutions proposées devront tenir compte des particularités locales et tendre également vers une utilisation polyvalente des constructions scolaires appelées à redevenir un foyer d'animation culturelle et sociale permanent.

ii) - Faciliter la fréquentation scolaire

Il faut s'efforcer de nuancer le dilemne transport scolaire/internat et tenir compte du fait que l'accès à l'école est plus ou moins difficile selon les saisons.

- L'internat saisonnier

L'hiver, par grand froid et journée courte, le transport scolaire est difficile à supporter par l'enfant. On peut envisager de ne recevoir un enfant en internat que de décembre à mars, par exemple. Une telle solution entraînerait des coûts de non-rentabilisation des investissements d'internat et de transport scolaire. Une expérience dans ce sens peut cependant être tentée si elle rencontre l'adhésion des parents d'élèves.

- L'internat

Pour l'école élémentaire, cette solution peut convenir aux zones d'accès particulièrement difficile. L'expérience, tentée à Chastreix, pourrait éventuellement être renouvelée.

La qualité des internats du second degré devra, de son côté, dans de nombreux cas être améliorée.

- Transport scolaire

L'achat par l'établissement ou la commune d'un car permettant d'assurer tout ou partie du ramassage a été envisagé. Cette solution aurait l'avantage d'offrir une grande souplesse pour l'utilisation de la part du temps pédagogique qui doit être consacrée aux activités d'éveil et de découverte de différents aspects de la vie économique, sociale, culturelle (10 % de l'horaire hebdomadaire).

La participation des familles au service a également été envisagée. Il serait intéressant qu'une expérience soit faite dans ce domaine en réglant tous les problèmes d'assurances, de régularité et d'indemnisation qu'elle comporte.

iii) - Adaptations pédagogiques

- Rythme scolaire. Le phénomène saisonnier est particulièrement sensible en zone rurale. Il devrait être possible de moduler les horaires suivant les saisons.

- Adaptation au milieu

L'enseignement ne doit pas couper l'enfant de son milieu d'origine mais lui permettre de le comprendre et de l'apprécier. Un enseignement en harmonie avec le milieu devrait éventuellement encourager le maintien des éléments de qualité en zone rurale.

Les activités à caractère manuel ou préprofessionnel se rattacheront le plus souvent possible à la vie agricole ou à l'artisanat rural.

En contrepartie, les activités au titre de 10 % pourraient consister à apprendre aux enfants à connaître le milieu urbain et son mode de vie. Des échanges ville-campagne pourraient être envisagés.

- Formation continue et permanente

Il convient d'expérimenter toute action permettant à l'école, au collège et au lycée professionnel rural de redevenir un foyer de vie culturelle et de promotion collective. Des actions expérimentales devront notamment concerner les formations professionnelles, tandis qu'une meilleure coordination devra être instaurée avec les enseignements agricoles.

iv) - Amélioration de la condition des enseignants

Le but recherché est de stabiliser dans des structures pédagogiques durables un personnel de qualité et préparé à son rôle d'animateur en milieu rural.

Trois directions d'amélioration souhaitable de la condition des enseignants affectés dans ces zones peuvent être étudiées dans cette perspective :

- Le logement
  - aide et incitation des communes à l'amélioration du logement des instituteurs ;
  - extension du droit au logement aux maîtres des petits collèges ;
  - aides à taux réduit pour l'achat ou la construction d'un habitat dans le milieu d'exercice.
- des majorations salariales liées au poste
  - pour être efficaces, ces aides doivent être suffisamment "attractives" ;
  - indemnité d'installation ;
  - indemnités spéciales modulées suivant l'ancienneté dans le poste, pour inciter à la stabilité ;
  - avancement accéléré ;
  - bourses pour la continuation des études des enfants des enseignants.

- La formation initiale et continue
  - L'enseignant en milieu rural "d'altitude" doit être un animateur. Il devrait recevoir une formation conçue en fonction de cette exigence ; élargissement nécessaire de sa formation initiale et intervention possible des autres ministères dans cette formation (Agriculture, notamment).
  - Les activités d'animation extra-scolaire auxquelles il participe doivent pouvoir être rémunérées par leurs organisateurs.

Parmi cet ensemble de mesures, qui constitue incontestablement un projet ambitieux, un certain nombre ont d'ores et déjà pu être engagées grâce à l'affectation de ressources spécifiques de l'Etat, d'un montant important.

Globalement, les moyens financiers supplémentaires qui ont pu être dégagés pour ce programme ont été de 7 millions de francs en 1975, 25 millions en 1976 et 36 millions en 1977.

Une très grande initiative a été laissée au préfets de région et aux recteurs pour apporter des solutions originales aux problèmes qui étaient posés.

On peut faire un bilan des actions entreprises et mettre également en relief les points sur lesquels un effort reste à faire.

- Amélioration de la qualité de l'enseignement du premier degré

Les crédits consacrés à cet enseignement ont permis de financer soit des constructions neuves, soit, de préférence, l'aménagement de locaux afin d'encourager les regroupements pédagogiques intercommunaux et la scolarisation pré-élémentaire. Environ 140 opérations de ce type ont été réalisées ou sont programmées en 1977.

Deux actions ont eu un caractère particulièrement novateur. Un internat du premier degré a été financé à Allanches dans le Cantal pour permettre la scolarisation, dans des conditions très sensiblement améliorées, des élèves du premier degré de cette zone d'accès particulièrement difficile.

Neuf équipes de liaison pédagogique ont été mises en place, ou sont en voie de constitution. Chaque équipe est constituée en fait d'un véhicule doté d'un important matériel pédagogique et audiovisuel et d'un enseignant-conducteur. Chaque équipe dessert une quinzaine d'écoles à classe unique et un collège d'enseignement général où elle est basée. Elle permet, d'une part, d'apporter à ces écoles un matériel dont les communes n'avaient pu les doter, d'autre part, de permettre un échange d'idées entre l'enseignant dans sa classe et le responsable de l'équipe. Le résultat de cette action paraît très encourageant ; elle a permis de rompre l'isolement du maître et d'inviter celui-ci à sortir de la routine quotidienne. Il faut noter, d'ailleurs, que cette expérience est sortie du cadre purement scolaire puisque les parents ont demandé dans certaines communes à bénéficier également des séances de projections de films ou de montages audio-visuels.

Dans le second degré, l'effort a porté sur plusieurs points :

Tout d'abord, au niveau de la carte scolaire, le ministre a décidé, dans le périmètre Massif Central, de maintenir soixante sept petits collèges dont la suppression aurait dû intervenir à court terme. Il faut noter d'ailleurs que cette décision, qui correspond à un désir fréquemment exprimé par les populations rurales, pose un problème en termes d'équipement puisque certains de ces collèges offrent des conditions d'hébergement peu satisfaisantes. Le programme Massif Central a déjà permis la reconstruction complète de quatre de ces établissements.

Une attention particulière a été portée aux internats des collèges dont on a vu qu'ils constituaient une des caractéristiques du mode de scolarisation dans le Massif Central : trois internats ont pu ainsi être construits afin d'améliorer très considérablement les conditions d'accueil des enfants éloignés de leur famille.

Il faut également signaler que des crédits ont été consacrés à l'implantation d'ateliers dans les collèges ruraux ainsi qu'à la création de centres de documentation et d'information.

Chaque fois que cela a été possible, on a encouragé l'ouverture de l'école sur le milieu afin de permettre une utilisation plus polyvalente des locaux.

Dans l'enseignement technologique, l'effort le plus marquant a consisté dans le financement d'un lycée hôtelier qui doit permettre d'accompagner, sur le plan de la formation des hommes, l'effort qui est fait pour relancer le thermalisme et le tourisme.

Deux sections techniques pour les métiers du bois ont été implantées dans la perspective d'une relance de l'activité forestière et de l'industrie du bois.

Par ailleurs, les crédits dégagés doivent permettre d'aménager deux collèges d'enseignement technique recevant une population essentiellement rurale.

Quant aux enseignants, un effort important a été consenti pour améliorer les conditions de logement d'une trentaine d'instituteurs des villages isolés. On espère par cette action encourager la stabilité des enseignants et inciter les conseils généraux et les communes à prendre le relais. Pour l'instant, aucun avantage financier particulier n'a pu être consenti aux enseignants des zones rurales profondes.

Le programme de l'éducation dans le Massif Central a eu certainement pour intérêt de permettre le passage des réflexions théoriques sur le milieu rural à une action concrète. Le bilan montre cependant que l'on a eu beaucoup de difficultés pour résoudre les problèmes posés autrement qu'en termes d'équipements. Il est très caractéristique de noter que les suggestions faites par le ministre pour que l'on aborde les questions de rythmes scolaires et d'adaptation pédagogique ont eu peu de suites jusqu'ici.

Au-delà du bilan chiffré des actions qui ont pu être conduites dans le cadre du programme Massif Central, on peut s'interroger sur l'efficacité des mesures prises et de la méthode adoptée. Il convient de prendre les précautions nécessaires du fait du faible recul dont on dispose. On peut essayer de situer ce jugement à trois niveaux :

- La participation au développement économique du Massif Central

Dans cette perspective, l'enseignement, technologique notamment, devrait se calquer sur les projets économiques de la région. On a vu plus haut que ces projets restaient encore assez imprécis, si ce n'est dans leur volume du moins quant au secteur d'application, en dehors de quelques secteurs comme le tourisme et l'industrie du bois pour lesquels des établissements de formation ont pu être financés.

Pour le reste, le développement économique du Massif doit se fonder surtout sur l'artisanat et les petites industries, ce qui justifie l'implantation ou le maintien de collèges d'enseignement technique de petite taille dans des communes de dimension modeste. On a vu que grâce au programme, deux collèges de ce style ont pu être financés.

- L'amélioration du service public de l'éducation

Dans ce domaine, le but est de rapprocher un service public de qualité des usagers. C'est par le moyen du réseau scolaire que l'on peut atteindre cet objectif. Il s'agit aussi d'éviter que la défection de "l'école" soit le signe du départ de toute une population. L'effort consenti a été très important dans cette direction, mais il est beaucoup trop tôt pour juger de l'effet de telles mesures.

- L'évolution des mentalités

En ce qui concerne les autorités administratives responsables, le fait de disposer de crédits spécifiques pour le milieu rural a permis certainement une sensibilisation nouvelle à ce problème. En effet, dans la période précédente, les besoins liés à la croissance des villes principales a conduit à "oublier" les zones rurales dans l'affectation des crédits. A terme, on peut espérer que, sur les ressources qui leur seront affectées, les préfets feront une plus juste part au milieu rural.

Il est intéressant de voir également que, grâce à ce programme, des idées venant des régions ont pu être mises en oeuvre (équipe mobile de liaison pédagogique, par exemple).

Pour ce qui est de la population du Massif Central, on peut penser que l'effort consenti contribuera à lui donner confiance en l'avenir. L'exemple de l'Etat qui investit et innove peut apparaître comme un stimulant pour les individus dans leurs entreprises personnelles.

Au terme de cette étude, et à la lumière de l'exemple du programme "Massif Central", on peut s'interroger sur la possibilité d'aller plus loin et de définir une véritable politique de l'éducation dans le cadre de la région. Le rapport de la Commmission de développement des responsabilités locales (commission Guichard)(1) présente l'enseignement comme un secteur test d'un véritable esprit de décentralisation.

Dans l'état actuel de la France, il semble prématuré d'envisager une véritable décentralisation de la pédagogie, les Français étant trop attachés à l'unité des programmes d'enseignement, considérés comme l'un des reflets de l'unité nationale.

En revanche, la déconcentration de la carte scolaire, qui est actuellement mise en oeuvre, avec la possibilité pour les recteurs, en concertation avec les instances régionales, de définir des objectifs de scolarisation dans les divers types d'enseignements du second degré, est de nature à faire prendre conscience aux régions de leurs problèmes propres et d'y apporter des solutions spécifiques. Dans ces conditions, l'enseignement sera véritablement en mesure de contribuer à un développement différencié des regions.

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1) Publié en décembre 1976 à la demande du Président de la République.

Summary of Technical Report No. 3

EDUCATION IN REGIONAL DEVELOPMENT POLICY IN FRANCE

by

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Ministry of Education

GENERAL ORGANISATION OF EDUCATION IN FRANCE

The internal history of France might be summarised as the struggle of a centralised power, whether monarchial or Jacobin, against independence in the provinces. Thus the implantation of a system of education controlled from Paris was concerned first of all with the promotion of national unity and the formation of an elite loyal to the State. Today, the system is still characterised by centralisation, though the modern objective of equality of opportunity in education has been also to the forefront for almost a hundred years (see Law of Jules Ferry, 1882, and more recently the Ordonnance of Général de Gaulle in 1959). It is the Minister of Education, aided by a large centralised administration, who defines the curricula and determines the teaching organisation of the educational establishments. The teachers are paid by the State and the State also finances the construction and administration of school buildings. Regional academics have not had up to recently a great deal of autonomy: the function of the rectors and their inspectors was simply to supervise the application of Ministerial decrees to the schools in their circumscriptions. Even the succession of courses available to students in general or vocational education is essentially determined in Paris as are the numbers of students to be received into the various educational streams or channels. In brief, except for the physical organisation of elementary education (see the Law of 1886), there has been little place for regional autonomy in the educational field.

REGIONAL DISPARITIES AND EDUCATION

The gradual awakening to the existence of regional disparities in France, for example in population growth, income, etc., has recently led to a recognition that regional development must be planned and undertaken. Since 1960 in particular, effective action has been taken. Regional bodies with enlarged powers have been set up and the Prefect of the Region, with his responsibility for the economic development of the region, has now real legal and financial power. The law of 5th July 1972 has set up "établissements publics régionaux" (EPR) made up of two assemblies: the Regional Council and the Socio-economic Committee. It is hoped:

- to fully equip eight metropolises in the provinces to counteract the continued growth of Paris and its region, to encourage the growth of these cities and the smaller cities and towns in their hinterlands;
- to industrialise the underdeveloped regions by making it more attractive for industrialists to locate factories in these regions;
- to put into practice a zoning policy.

Parallel to this new recognition of the need for regional development, more thought has been given to regional needs in education. New powers have been given to the rector in his region and the State funds available for education are now determined by him in consultation with the various regional bodies. However, he still does not have the necessary legislative power to enable him to match educational planning to the needs of his region, although this is being mooted.

AN EXAMPLE: EDUCATION AND THE DEVELOPMENT OF THE MASSIF CENTRAL

There follows in the report:

- a presentation of the region, the Massif Central;
- the main objectives of the development programme;

i.e.; (i) improvement of communications to and within the Massif Central: (ii) exploitation of the chief resources of the region, that is, agricultural resources (chiefly cattle-rearing) and artisanal industries; (iii) educational objectives, particularly to improve radically infant and primary schooling so that children from remote or mountain regions will enjoy educational and cultural opportunities equal to those enjoyed by other children. According to President Valéry Giscard d'Estaing in a speech made on 29th September 1975, a special analysis will be made of teaching methods and school curricula suited to children from such regions, and small communes will be helped by subsidies for school transport.

Following the President's speech, an analysis of education in the Massif Central was undertaken by the Minister of Education. It shows that while children in the region receive no less education than other children in France, yet there exist problems specific to the region. At primary level:

- there is a low rate of school attendance especially in "classes maternelles et enfantines" i.e. the initial years of schooling;
- there are many schools with only one teacher.

At the secondary level, there exist many rural CEG (collèges d'enseignement général) of mediocre quality and a large number of children are obliged to go to boarding schools in order to pursue secondary education courses. To resolve these problems it is hoped:

- to improve the school system in order to take into account changes in population and to avoid one-teacher-per-school situations. Afternoon use of schools as social centres is also recommended;
- to aid children of all ages, and especially those in isolated communities, to attend the school of their choice;
- to adapt education to the environment so that the child will not feel cut off from his surroundings, and to favour the integration of the child into worthwhile economic activities in his region. Thus vocational training, agricultural courses, addition of workshops to schools, etc., are being promoted;
- to improve the situation of rural teachers by giving them special training, the opportunity to co-operate with fellow teachers,etc., and to attract teachers of high quality to rural schools by offering certain advantages such as higher salaries, housing benefits, etc.

In brief, by giving more control of education to local bodies, it is hoped to improve the quality of education and its adaptability to regional needs.

Rapport technique n° 4

LE ROLE DE L'ENSEIGNEMENT DANS LE DEVELOPPEMENT DES ZONES DE MONTAGNE EN SUISSE

préparé sous l'égide de l'Office de
la Science et de la Recherche à Berne
par
M. E. Venturelli
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du canton du Tessin

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AVANT-PROPOS

A la suite de la loi fédérale de 1974 sur l'aide en matière d'investissements dans les zones de montagne, un nombre considérable de ces zones se sont constituées en régions et ont mis sur pied des programmes de développement à long terme. Ces programmes déterminent notamment les investissements d'infrastructure pour lesquels une aide fédérale est prévue dans le cadre général du développement économique, social et culturel de ces régions.

Il sera donc intéressant d'étudier les problèmes de l'éducation dans le contexte du développement général de quelques-unes des régions de montagne qui ont élaboré elles-mêmes leurs propres programmes de développement en vue de remplir les conditions d'octroi des crédits imposées par la loi.

La mise en oeuvre des programmes de développement des zones de montagne se fait selon le principe de la décentralisation : ce sont en fait les régions elles-mêmes qui, d'une façon très autonome, ont choisi le type de développement qu'elles préconisent.

Si dans d'autres pays à structure politique plus centralisée, le problème consiste souvent à faire "descendre" dans les régions et à faire accepter des décisions prises au niveau central, le problème caractéristique de la Suisse réside plutôt dans la nécessité d'harmoniser et de coordonner des décisions qui sont prises de façon autonome par les différentes autorités : commune, région, canton.

Ce rapport est la synthèse de contributions de différentes personnes appartenant à des institutions qui n'ont pas souvent l'occasion de confronter leurs idées : institutions qui s'occupent de l'enseignement, en particulier de la planification, institutions qui s'occupent de développement régional, surtout du point de vue économique ou de l'aménagement du territoire. La participation à ce projet de l'OCDE a permis un échange de vues fructueux entre les personnes, dont les noms suivent, qui ont participé activement à la rédaction de ce rapport :

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Je tiens à remercier les auteurs du présent rapport pour leur remarquable effort ainsi que les institutions auxquelles ils appartiennent et qui leur ont permis de le faire, et tout particulièrement M. Venturelli, du Département de l'instruction publique du canton du Tessin, qui s'est chargé de la coordination et de la mise au point du rapport.

U. Hochstrasser
Directeur de
l'Office de la
Science et de la Recherche

I. LA POLITIQUE DE DEVELOPPEMENT REGIONAL EN SUISSE

La longue période de croissance économique accélérée, qui a caractérisé l'après-guerre, a eu pour conséquence, en Suisse comme dans d'autres pays européens, une forte tendance à la concentration géographique de la population et des activités économiques. Loin d'apporter un équilibre dans les conditions de vie, cette tendance a provoqué un accroissement des différences inter-régionales. L'intérêt pour les problèmes régionaux, qui s'est éveillé vers 1965, doit donc être interprété comme une réaction aux conséquences de ces tendances, comme un effort pour rééquilibrer la distribution spatiale des activités économiques et de la population. La nouvelle politique en faveur des régions de montagne est, du moins en partie, le résultat de cet intérêt. Cette politique régionale - la seule de la Confédération - fait suite aux mesures en faveur de la population des régions de montagne que le gouvernement central a introduites successivement au cours des 50 dernières années. En d'autres termes, on peut affirmer que, bien qu'il existe en Suisse une discussion sur la nécessité d'une politique régionale, couvrant tout le territoire national et visant à réduire les écarts inter-régionaux, les interventions de la Confédération ne concernent, pour le moment, qu'une partie de ce territoire, plus précisément les régions de montagne.(1)

1. Le cadre institutionnel

Avant de nous occuper de cette politique, il est nécessaire de préciser le cadre dans lequel il faut intégrer l'analyse entre développement économique et enseignement. La Suisse est un Etat fédéraliste, formé du regroupement de 25 cantons en une Confédération d'états.

La répartition des compétences aux deux niveaux institutionnels principaux - celui de la Confédération et celui des cantons - est régie par le principe de "subsidiarité" qui, en règle générale, ne prévoit une intervention du gouvernement central, c'est-à-dire de

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1) La politique en faveur des régions de montagne est normalement interprétée comme un premier pas vers une politique régionale de la Confédération. Voir à ce propos, F. Mühlemann: Regionale Wirtschaftsförderung in der Schweiz, Berichte zur Raumforschung und Raumplanung, Heft 3/4, 1976.

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la Confédération, que lorsque les cantons ne sont plus à même de faire face à eux seuls à leurs problèmes.

Il s'ensuit que, lorsque l'on veut étudier exhaustivement les relations entre deux ou plusieurs domaines d'intervention des pouvoirs publics, tels que la politique de développement et la politique de l'enseignement par exemple, il faut tenir compte de cette situation. Ceci devrait nous amener à examiner la relation entre les deux politiques au même niveau institutionnel (Confédération ou cantons) ainsi que celle opérant à des niveaux institutionnels différents (Confédération/cantons). Cela n'est pas possible d'une façon exhaustive. C'est pourquoi nous avons choisi de présenter quelques cas particuliers, pour donner au moins une idée de l'éventail des situations régionales.

2. Les fondements de la politique de développement régional

Les mesures de politique régionale de la Confédération se fondent sur les dispositions de l'article 31 bis de la Constitution fédérale, lequel précise notamment que, lorsque l'intérêt général le justifie, la Confédération est autorisée à légiférer en ce domaine :

- pour maintenir des branches économiques et des professions menacées ;
- pour conserver une population rurale saine et une activité agricole efficiente ;
- pour protéger des régions dont l'économie est menacée.

La nature même de ces dispositions a fait que la politique régionale de la Confédération s'est développée sous forme d'interventions ponctuelles en faveur d'un secteur ou d'une région particulièrement menacés, mais sans véritable effort de coordination, pour orienter cette politique vers la réalisation d'objectifs d'intérêt national. Ceci a provoqué une dispersion des interventions avec un manque certain d'efficacité.(1) La nouvelle conception des régions de montagne doit être considérée comme une première tentative pour mettre fin à la dispersion des moyens. Elle envisage une intervention globale, qui devrait être réalisée par l'intégration de toutes les mesures de promotion dans une stratégie de développement valable pour l'ensemble de la région.

Cette stratégie doit s'inspirer des quatre principes suivants :

- la régionalisation
- la globalité de la promotion
- l'efficience économique
- la concentration des moyens et la diffusion des effets.

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1) Voir H. Leibundgut : Investitionshilfe für Berggebiete in der Schweiz, Berichte zur Raumforschung und Raumplanung, Heft 1, 1975.

a) Selon cette conception, la politique d'aide au développement doit être appliquée au niveau de la région, c'est-à-dire, dans le cas de la Suisse, au niveau d'une unité géographique dont les limites sont généralement inférieures à celles du canton.

b) La politique de promotion du développement des régions de montagne se propose d'accélerer le taux de croissance du revenu par habitant. Pour ce faire, il est évident qu'il ne suffit pas de promouvoir les activités agricoles. Du fait de nombreuses difficultés et d'obstacles naturels, en effet, la productivité de l'agriculture en montagne restera probablement en dessous de la moyenne de la productivité nationale. En conséquence, les revenus de la population montagnarde ne pourront se rapprocher du revenu moyen que si cette population obtient des possibilités de gain supplémentaire dans les secteurs de production extra-agricoles. La politique de développement devrait permettre de créer les prémisses de ces possibilités d'emploi. A cette fin, elle doit couvrir tous les domaines de l'économie régionale. L'application de ce principe aura des conséquences assez importantes pour la politique de l'enseignement et de la formation professionnelle.

c) Il est évident qu'il ne s'agit là que d'une perspective dans laquelle il faudra aborder les problèmes du développement d'une région. En fait, on mettra au point une stratégie de développement s'appuyant sur certains secteurs, dont les ressources n'ont pas encore été exploitées et qui promettent une certaine rentabilité des investissements. La Confédération conçoit en effet son action comme une aide initiale, laquelle devrait déclencher un processus autonome de développement. Faute de moyens financiers, il faudra se limiter à des investissements dans les domaines les plus rentables, soit sur le plan financier, soit en termes de multiplicateurs du revenu ou de l'emploi.

d) On pense, enfin, que ses effets seront d'autant plus forts que les investissements seront concentrés. Cette concentration devrait permettre d'augmenter simultanément l'attraction de certaines localités de la région, tant au point de vue de la localisation des entreprises que de celui du lieu de résidence, et les bénéfices de ces investissements devraient profiter à toute la région. Dans ce contexte, on pense que la concentration de l'aide de la Confédération pourrait, en favorisant l'essor d'un centre, entraîner, à l'instar des pôles de croissance, le développement de toute la région.

3. La stratégie adoptée

Pour un Etat fédéral extrêmement décentralisé tel que la Suisse, intégrer les différentes mesures de promotion des zones de montagnes - mesures fédérales, cantonales et intercommunales - dans une politique globale de développement constitue une tâche particulièrement difficile.

La loi pour l'aide aux investissements dans les régions de montagne, acceptée par le Parlement fédéral en 1974, représente une tentative dans cette direction.

En vertu de cette loi, la Confédération accorde aux institutions publiques et/ou privées, ainsi qu'aux particuliers, qui réalisent des ouvrages d'infrastructure en région de montagne des crédits à des conditions avantageuses, pour un montant qui correspond au maximum à 25 % de la dépense d'investissement globale.

Selon l'article 2 de ladite loi, l'aide financière de la Confédération permet de faciliter la réalisation d'ouvrages d'infrastructure dans les domaines suivants :

- les voies de communication
- les services publics (eau potable, gaz, électricité)
- les canalisations d'égouts et des stations d'épuration des eaux
- l'équipement nécessaire à la santé publique
- l'équipement touristique dans la mesure où il répond à des besoins collectifs
- l'équipement culturel et sportif
- les installations destinées à la distribution des biens de consommation de première nécessité
- l'équipement scolaire et celui de la formation professionnelle.

L'aide financière n'est accordée que pour des projets d'infrastructure dont l'importance est reconnue par le programme de développement régional. En effet, pour l'obtention des crédits, la loi exige qu'un ensemble de conditions soient réunies, qui sont en résumé :

Constitution de la région : une région peut accéder au crédit si, tout en remplissant certaines conditions socio-économiques (homogénéité géographique, existence d'un centre de l'infrastructure vers les zones périphériques, etc.) elle existe politiquement : constitution volontaire d'une association de communes, qui doit être formellement reconnue par le canton.

Définition d'un programme de développement : ce programme doit être le résultat d'un travail d'analyse et de prévision des principaux besoins de la région, effectué par des organismes spécialisés en étroite collaboration avec les représentants de la région (création de groupes de travail régionaux, par secteur ou par sous-région). C'est par ce programme que la stratégie de développement de la région est définie et que les quatre principes de la conception fédérale vont trouver leur application. Le programme de développement doit préciser les objectifs et les mesures par lesquels on se propose de promouvoir, à long terme, le développement de la région. Le programme de développement devrait comprendre quatre objectifs interdépendants :

a) des objectifs démographiques
b) des objectifs de bien-être
c) des objectifs concernant la structure de la production et le marché du travail
d) des objectifs concernant le pouvoir d'attraction de la région.

Approbation du programme

- par l'assemblée de la région
- par le canton et la Confédération.

L'ensemble de ces conditions constitue la première véritable base pour la création d'une politique régionale en Suisse. Dans ce contexte, on entend donc par région l'association volontaire de communes en vue d'obtenir du canton et de la Confédération certaines facilités financières, association qui, de ce fait même, s'intéressera à la définition d'un programme de développement régional.

Le difficile équilibre entre les besoins considérés aux niveaux communal, régional, cantonal et fédéral n'est possible que grâce à la procédure d'approbation. Cette procédure implique une concertation permanente entre les différentes parties concernées que sont la population de la région et ses organes, le canton, la Confédération. Le programme de développement d'une région demande en outre un investissement financier considérable pour l'analyse de la réalité socio-économique de la région. La Confédération prend 80 % de ces frais à sa charge. Si l'on sait que les régions sont actuellement plus de 50 et qu'elle recouvrent plus du 75 % du territoire helvétique, on peut imaginer l'importance de l'effort à faire.

4. Le dépassement du cadre prévu par la loi fédérale

Le programme de développement devra aussi envisager des mesures qui peuvent contribuer au progrès régional sans intervention directe ou immédiate sur l'activité d'investissement. C'est ici que la politique de l'enseignement et de la formation professionnelle peut avoir une grande importance, étant spécifiquement du ressort des cantons. Il faudra donc aussi que le programme de développement tâche d'assurer la coordination des mesures fédérales et cantonales et d'orienter toutes ces mesures vers la réalisation des objectifs de développement d'une région donnée.

II. LE SYSTEME D'ENSEIGNEMENT EN SUISSE : STRUCTURE DES COMPETENCES

La politique de développement régional, esquissée dans ce rapport à travers les grandes lignes de la loi fédérale d'aide aux investissements dans les régions de montagne, définit des ensembles régionaux qui sont généralement à l'écart des structures politiques et administratives traditionnelles du pays bien qu'ils s'appuyent sur elles. Ainsi, afin de mieux saisir la portée et la dimension des problèmes mis en évidence par les brèves études de cas qui suivent, convient-il de consacrer quelques lignes à la description du partage des compétences constitutionnelles et légales en matière de politique de l'éducation. Nous examinerons ensuite sommairement les mécanismes de planification et les caractéristiques de l'évolution récente dans ce secteur.

1. Partage des compétences constitutionnelles et légales

Les compétences de l'Etat fédéral

Constitutionnellement, la Confédération est nantie des compétences suivantes en matière de politique de la formation :

- Elle peut créer des établissements d'enseignement supérieur ou les subventionner. De fait, elle assume la responsabilité de deux écoles polytechniques et assure, par voie de subvention, une partie du financement des universités cantonales et, partant, une tâche de coordination et de planification de l'enseignement supérieur ;
- Elle légifère sur la formation professionnelle dans l'industrie, les arts et métiers, le commerce, l'agriculture et le service de maison, et participe à son financement ;
- Elle édicte des prescriptions sur les certificats de maturité et s'assure par là une influence importante dans la politique de l'enseignement secondaire général pré-universitaire ;
- Elle subventionne les dépenses des cantons en matière de bourses d'études et autres aides financières à l'instruction ;
- Elle alloue des subventions aux cantons en vue de les aider à remplir leurs obligations dans le domaine de l'instruction primaire ;
- Elle édicte des prescriptions sur la pratique de la gymnastique et des sports pour la jeunesse.

Les compétences cantonales

Conformément à la Constitution fédérale (article 27bis), l'organisation, la direction et la surveillance de l'école primaire sont du ressort des cantons.

Ces derniers confient cependant une partie de leurs tâches aux communes. Chacun des vingt-cinq états cantonaux a ainsi une loi scolaire délimitant les compétences respectives du canton et des communes et qui précise l'organisation de l'enseignement dans les divers degrés. En effet, bien que la Constitution fédérale ne mentionne que l'enseignement primaire, les cantons assument également la responsabilité de l'enseignement secondaire (tout en respectant l'ordonnance sur les certificats de maturité), de l'enseignement professionnel (conformément à la loi fédérale qui s'y applique) et de l'enseignement supérieur. (A l'exception des deux écoles polytechniques.)

Le financement des dépenses d'éducation

La répartition des dépenses d'enseignement selon les collectivités publiques révèle en partie la structure des compétences de ces dernières selon les niveaux et types d'enseignement.

Ainsi les communes affectent-elles plus de 80 % de leurs dépenses d'éducation aux cycles obligatoires de la scolarité.

L'enseignement secondaire est financé à près de 90 % par les cantons qui y consacrent près du quart de leurs dépenses d'éducation.

La structure du financement de la formation professionnelle et de l'enseignement supérieur, en sens inverse l'un de l'autre, ne reflète pas, quant à elle, la distribution légale des compétences.

En effet, si la formation professionnelle est largement régie par la législation fédérale, ce sont les cantons et les communes qui supportent ensemble près de 80 % des dépenses de ce niveau. Par ailleurs, les universités sont cantonales, à l'exception des deux écoles polytechniques qui sont fédérales ; or, cantons et communes financent actuellement moins de 50 % des dépenses d'enseignement supérieur et de recherche, alors que la Confédération fait l'appoint en affectant presque 80 % des dépenses totales d'enseignement et de recherche à ce niveau.

Dans l'ensemble, les dépenses publiques d'éducation sont supportées à raison de quelque 35 %, par l'ensemble des communes ; 45 à 48 % par les cantons, 16 à 19 % par la Confédération. Ceci confirme que le secteur de l'éducation est essentiellement financé par les états cantonaux et les collectivités locales (à titre de comparaison, signalons que la totalité des dépenses des collectivités publiques en 1974 s'est répartie de la manière suivante : 30 % communes, 34 % cantons, 36 % Confédération).

REPARTITION DES DEPENSES D'ENSEIGNEMENT ET DE RECHERCHE ENTRE LA CONFEDERATION, LES CANTONS ET LES COMMUNES

Moyenne des années 1970-1974
en %

a) Selon le type d'établissements

	Ecoles publiques inférieures	Ecoles moyennes	Formation professionnelle	Etablissements universitaires et Recherche
Confédération	1	3	20	56
Cantons	41	90	43	43.5
Communes	58	7	37	0.5
	100	100	100	100

b) Selon les sources de financement

	Ecoles publiques inférieures	Ecoles moyennes	Formation professionnelle	Etablissements universitaires et Recherche	Non ventilable
Confédération %	4	3	17	76	-
Cantons %	44	24	11	18	3
Communes %	83	2	12	0.3	-

Source: Administration fédérale des Finances, Berne.
Travaux préparatoires du 3e rapport du C.S.S., Berne, 1976.

2. Mécanismes de planification de l'enseignement

Peut-être plus encore que le découpage constitutionnel et légal, la capacité de dépenser des trois types de collectivités publiques montre à l'évidence que, hormis l'enseignement supérieur universitaire dont le rôle est nul dans le contexte du développement régional tel que nous l'entendons (aucune université ou école polytechnique n'est située en région de montagne), c'est le cadre politique et administratif cantonal qui constitue l'unité dans laquelle s'opère, ou peut s'opérer, la planification du système éducatif.

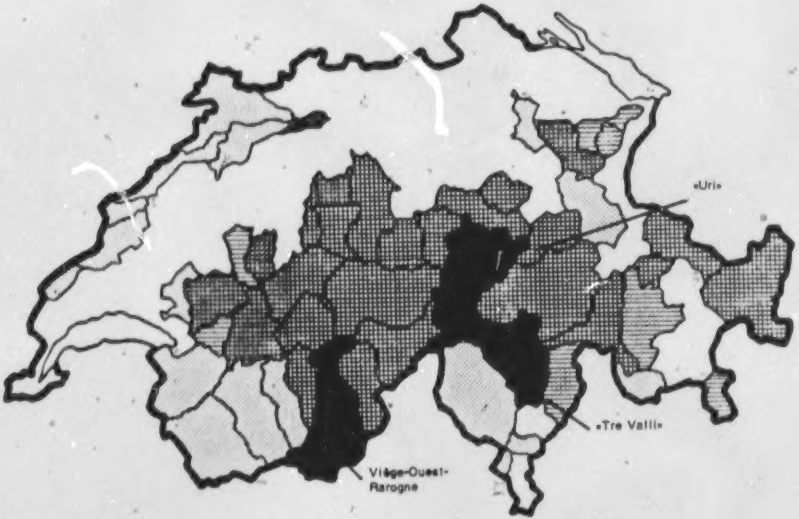
Les mécanismes de planification de l'enseignement sont aussi divers que le sont les contextes socio-culturels, l'environnement administratif et légal ainsi que l'équipement technique de l'appareil de gestion de l'Etat.

S'il fallait définir en peu de mots la fonction de planification des cantons en matière d'éducation, il conviendrait de dire qu'en général elle se répartit à tous les niveaux de gestion du système scolaire. Lorsque cette planification est explicite, elle est en général sectorielle, n'intéressant qu'un niveau d'éducation ou n'en traitant qu'un aspect (les investissements, la structuration du niveau considéré, l'ordonnancement du curriculum...); ses liens avec la planification économique et sociale entreprise par ailleurs sont souvent ténus et en tous les cas plutôt implicites. Toutefois cette conception très fractionnée du processus de planification présente l'intérêt d'impliquer relativement beaucoup de personnes et par là de créer des conditions plutôt favorables à une participation démocratique.

3. Evolution récente

Les quinze dernières années ont été marquées par la recherche de solutions dépassant le cadre cantonal : politique concordataire pour la gestion d'institutions de formation au service de communautés inter- ou supracantonales, politique de coordination sur l'ensemble du pays ou au niveau d'un ensemble de cantons, migrations internes, homogénéisation des conditions et des modes de vie ; les réformes, voulues par l'expansion du système scolaire, ont engendré un mouvement vers la recherche de solutions plus globales et de modalités de coopération supracantonale.

La discussion actuelle concernant les politiques de développement régional réintroduit dans le débat de la politique scolaire le souci de préserver l'autonomie communale. Il faut dire, à la vérité, que cette dernière est loin d'être négligeable puisque la distribution des établissements scolaires obligatoires est assez largement tenue sous le contrôle des communes.



III. ROLE DE L'ENSEIGNEMENT DANS LE DEVELOPPEMENT DES ZONES DE MONTAGNE - TROIS ETUDES DE CAS

Dans les pages qui suivent, on présente la synthèse des travaux relatifs à la définition de trois programmes de développement, leurs caractéristiques et les objectifs propres à l'enseignement.

Par le choix des régions, on a voulu montrer les différences entre les problèmes qui se posent à une région sous-cantonale et ceux d'une région-canton. Bien qu'il existe déjà une région intercantonale, nous ne pouvons pas encore synthétiser les résultats de cette expérience ; nous avons donc choisi une autre région sous-cantonale, car la plupart des régions existent à ce niveau et les problèmes qui les caractérisent sont plus complexes que ceux d'une région-canton.

Les études de cas portant sur trois programmes de développement, ainsi que la synthèse, ont été effectuées par divers organismes dont chacun a sa propre stratégie et sa propre conception du rôle de l'enseignement dans la réalisation du programme final.

Nous avons voulu souligner la diversité qui caractérise ces études de cas en gardant le style des auteurs, leur terminologie, et les subdivisions internes des problèmes. Chaque étude comprend au moins quatre sections communes :

- Caractéristiques de la région
- L'offre d'enseignement dans la région
- La demande d'éducation dans la région
- Le programme de développement : la place de l'enseignement.

LA "REGIONE TRE VALLI"
DANS LE CANTON DU TESSIN

Le programme de développement de la "Regione Tre Valli" (RTV) est encore en voie d'élaboration. Cette étude donne le résultat des travaux préparatoires et des premières décisions prises par la région elle-même sur les orientations générales de son programme de développement, ainsi que des discussions sur les objectifs à poursuivre en matière d'enseignement qui ont eu lieu dans la Commission "école, formation professionnelle et culture" instituée par la région.

A. CARACTERISTIQUES DE LA "REGIONE TRE VALLI" (RTV)

Situation géographique

La RTV, au nord, s'accroche au versant méridional du massif du Saint-Gothard (Alpes centrales). Au sud, ses communes les plus méridionales se trouvent à 6 km de Bellinzona, ville de 17 000 habitants, qui est le siège du gouvernement et de l'administration publique du Canton du Tessin. Deux des trois vallées (Riviera et Leventina) qui forment cette région de 1 000 km^2 de superficie brute sont situées sur le principal axe nord-sud qui traverse la Suisse ; elles sont parcourues par le chemin de fer et la route nationale ; la troisième vallée (Blenio) est une vallée latérale, qui mène au col du Lucomagno.

Démographie et activités économiques

La région a une population de 26 500 habitants répartis dans 47 communes dont une - Biasca, à la croisée des trois vallées - compte 4 700 habitants et constitue le "pôle de développement" naturel de la RTV. La population active est de 12 000 habitants et les emplois sont au nombre de 11 350 : le solde des mouvements pendulaires de travailleurs entre la RTV et l'extérieur est donc de 650. Ceux qui sortent quotidiennement de la région pour aller au travail vont pour la plupart à Bellinzona et sont occupés essentiellement dans les services publics (administration cantonale, chemin de fer, postes et téléphones) et autres services (commerce, banque, ...).

La structure des emplois dans la région est la suivante :

- agriculture : 12 %
- carrières : 5 %
- industrie et artisanat : 35 % (dont métaux et machines 19 %)
- construction : 18 %
- services : 30 % (dont transports et télécommunications 7 %)

La RTV est donc faiblement "tertiarisée" (elle n'a aucun centre urbain) ; cinq branches d'activité (agriculture, carrières, métallurgie, construction, transports) totalisent à elles seules 61 % des emplois disponibles. Population, activités et services disponibles dans la région sont concentrés pour l'essentiel le long de l'axe nord-sud, à proximité du chemin de fer et de la route nationale.

Développement passé et tendances jusqu'en 1990

De 1950 à 1970, la RTV a connu un développement considérable (+ 22 % de la population totale, + 17 % de la population active, + 12 % du nombre d'emplois) déterminé dans une large mesure par l'accroissement des emplois offerts par une usine de métallurgie (619 nouveaux emplois de 1950 à 1970 sur un accroissement total de 1 213) et rendu possible par la forte immigration étrangère (la population suisse totale est restée stagnante, la population suisse active a diminué!). Mais les immigrés se sont établis dans les communes le long du chemin de fer et de la route nationale (Riviera et Leventina) ; par contre, les communes de montagne - spécialement celles de la Valle di Blenio - se sont dépeuplées, en conséquence de la très forte réduction des actifs dans l'agriculture.

Les nouvelles tendances "spontanées" du développement économique conduiront à la disparition de 1 550 des 11 350 emplois existant dans des branches qui connaissent aujourd'hui des difficultés structurelles (agriculture, habillement, horlogerie, construction et carrières) et donc à une émigration définitive de quelques milliers de personnes et à une augmentation de la pendularité extra-régionale.

B. L'OFFRE D'ENSEIGNEMENT DANS LA RTV

Le système d'enseignement dans le Canton du Tessin

Les possibilités d'éducation qu'offre l'instruction publique dans le Canton du Tessin vont de l'école maternelle (niveau préscolaire) au lycée (niveau pré-universitaire) et, dans le domaine de la formation professionnelle, à l'école technique supérieure (qui n'est pas de niveau universitaire comme le sont les écoles polytechniques fédérales). Il existe aussi une "école normale" qui forme les instituteurs pour l'école maternelle et primaire.

L'offre d'enseignement dans la région

Les types et niveaux d'école que l'on peut fréquenter dans la région elle-même sont l'école maternelle, l'école primaire, l'école moyenne (orientation pré-professionnelle et orientation scolaire), les cours d'introduction à l'apprentissage professionnel et les cours pour apprentis. Ces derniers sont le seul niveau d'études post-obligatoires présent dans la RTV.

L'école maternelle

Vingt des 44 communes(1) de la RTV (soit 45 %) ont une école maternelle. Le fait que 55 % des communes n'en sont pas dotées dépend de la politique cantonale dans ce domaine qui a établi l'objectif suivant : d'ici à 1980, équiper d'une école maternelle toutes les communes comptant au moins 400 habitants. Dans la RTV, les communes qui n'atteignent pas ce niveau démographique sont au nombre de 22.

L'école primaire

Il existe des écoles primaires communales et, pour les très petites communes géographiquement proches l'une de l'autre, des écoles intercommunales. Dans 27 des 44 communes de la RTV, il y a une école primaire communale ou intercommunale (61 %). Le transport des élèves vers les communes où siège l'école est organisé. Maintes petites communes n'ont pas voulu, ou n'ont pas pu, construire des écoles intercommunales et gardent des écoles à classes hétérogènes. Dans la RTV, un quart des instituteurs se trouvent devoir enseigner à 2, 3 et même plus de 5 groupes d'élèves de classes différentes ; vu les conditions dans lesquelles ils doivent travailler, la qualité de l'enseignement, dans la plupart des cas, en souffre.

L'école moyenne

Depuis 1976, on a commencé, dans le Canton du Tessin, à introduire l'école moyenne unifiée. Mais la grande majorité des élèves devront, pendant encore plusieurs années, choisir dès l'âge de 11 ans entre l'école moyenne préprofessionnelle ("Scuola Maggiore": SM) et l'école moyenne qui oriente vers des études supérieures ("Ginnasio": GI). Dans toute la RTV, il n'y avait qu'un seul GI, dans le "centre" de la région, à Biasca, jusqu'à septembre 1976. Depuis lors, il y a un deuxième établissement à Giornico (bassa Valle Leventina), "centre industriel" de la région.

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1) La RTV a 47 communes. Pour des raisons administratives, les statistiques scolaires que nous avons utilisées ne peuvent pas inclure les données relatives aux 3 communes les plus méridionales de la région, qui sont rattachées au district administratif de Bellinzona. Il s'agit de communes de moindre importance.

L'OFFRE D'ENSEIGNEMENT DANS LA REGION "TRE VALLI" : année scolaire 1976/77 (Nombre d'élèves)

Commune	Ecole maternelle	Ecole spéciale	Ecole primaire	"Scuole maggiori" (écoles moyennes préprofessionnelles)	Cours d'introduction à l'apprentissage	"Ginnasio" (1er cycle du lycée)	Apprentissage
BLENIO							
Aquila	28	-	29	77	-	-	-
Campo Blenio	-	-	-	-	-	-	-
Castro	-	-	-	-	-	-	-
Corzoneso	-	-	14	-	-	-	-
Dongio	20	-	31	-	-	-	-
Ghirone	-	-	-	-	-	-	-
Largario	-	-	-	-	-	-	-
Leontica	16	-	66	-	-	-	-
Lottigna	-	-	-	-	-	-	-
Ludiano	24	-	-	-	-	-	-
Malvaglia	29	-	113	60	-	-	-
Marolta	-	-	-	-	-	-	-
Olivone	21	-	72	40	-	-	-
Ponto Val.	-	-	14	-	-	-	-
Prugiasco	-	-	-	-	-	-	-
Semione	-	-	-	-	-	-	-
Torre	-	-	14	-	-	-	-
Total	138	-	353	177	-	-	-
LEVENTINA							
Airolo	67	-	172	53	-	-	-
Anzonico	-	-	-	-	-	-	-
Bedretto	-	-	-	-	-	-	-
Bodio	41	-	139	32	-	-	-
Calonico	-	-	-	-	-	-	-
Calpiogna	-	-	-	-	-	-	-
Campello	-	-	-	-	-	-	-
Cavagnago	-	-	6	-	-	-	-
Chiggiogna	-	-	-	40	-	-	-
Chironico	8	-	27	-	-	-	-
Dalpe	-	-	15	-	-	-	-
Faido	68	-	169	65	55	-	-
Giornico	47	18	106	54	-	178	-
Mairengo	-	-	14	-	-	-	-
Osco	-	-	-	-	-	-	-
Personico	18	-	24	-	-	-	-
Pollegio	39	-	58	-	-	-	-
Prato Lev.	19	-	35	-	-	-	-
Quinto	38	-	127	90	-	-	-
Rossura	-	-	-	-	-	-	-
Sobrio	-	-	-	-	-	-	-
Total	345	18	892	334	55	178	-
RIVIERA							
Biasca	221	-	523	165	72	332	215
Claro	30	-	105	31	-	-	-
Cresciano	15	-	38	-	-	-	-
Iragna	18	-	38	-	-	-	-
Lodrino	56	-	133	115	-	-	-
Osogna	24	-	61	-	-	-	-
Total	364	-	898	311	72	332	215

Source : Statistiques scolaires du canton du Tessin-Bellinzona.

Par contre, 12 communes sur 44 (27 %) ont une SM intercommunale. Il est évident que les déplacements des élèves sont beaucoup plus courts et faciles vers les 12 SM que vers les deux ginnasi, qui sont d'ailleurs géographiquement proches l'un de l'autre.

Cours d'introduction à l'apprentissage

Il existe deux écoles dispensant de tels cours qui durent une année, dans deux branches : préparation à l'apprentissage dit commercial (employés de bureau) et à l'apprentissage aux "arts et métiers" (métiers manuels). Ce type d'école est destiné à disparaître - dans tout le canton - à la suite de l'introduction de l'école moyenne unifiée (Scuola Media Unica - SMU) pour les jeunes de 11 à 15 ans, c'est à dire jusqu'à la fin de l'obligation scolaire.

Cours pour apprentis

Il s'agit de cours fréquentés un ou deux jours par semaine, pendant deux, trois ou quatre années, par les jeunes qui font un apprentissage commercial ou aux arts et métiers dans des entreprises privées ou publiques. Dans la RTV, à Biasca, il y a seulement quelques cours pour certaines branches des arts et métiers : serrurerie et constructions métalliques, mécanique générale, menuiserie, maçonnerie, taille de pierre, charpenterie, couture pour dame. Cette offre très restreinte de possibilités de formation professionnelle fait que 4/5 des apprentis doivent quitter la région pour fréquenter leurs cours hebdomadaires. En particulier, il n'y a pas de cours pour les apprentis de commerce, ni pour les vendeurs, ni pour toute autre profession du secteur tertiaire (services). La seule profession pour femmes qui est enseignée est celle de couturière pour dames. Il n'y a aucune école professionnelle à plein temps dans la région ni de cours de base pour agriculteurs.

Possibilités de formation hors de la région

A Bellinzona, la seule ville assez proche de la RTV pour que les élèves qui y fréquenteraient une école puissent rentrer le soir chez eux (bien que pour les villages les plus hauts et lointains ce soit presque impossible), il y a :

- le "Liceo" (école secondaire supérieure préparant à l'université)
- l'école de commerce et d'administration (école professionnelle à plein temps)
- l'école d'arts et métiers et l'école d'infirmiers (également à plein temps, toutes deux très sélectives parce qu'elles desservent tout le canton, avec ses 260 000 habitants)

- les cours pour apprentis de commerce et des arts et métiers (pour ces derniers, beaucoup de professions mais pas toutes).

Les autres écoles (école normale, école technique, institut de formation agricole, etc.) se trouvent à 40, 50 km et plus du centre de la région ; il faut donc rester toute la semaine hors de la région pour pouvoir les fréquenter.

C. LA DEMANDE D'EDUCATION DANS LA RTV

Le choix entre la Scuola Maggiore et le Ginnasio

La comparaison entre la RTV et le district urbain le plus proche (Bellinzona) en ce qui concerne les taux de transition de la 5e classe de l'école primaire vers la 1ère classe de la SM ou du GI, reflète très bien le manque de possibilités et de stimulants pour le choix d'une filière scolaire pouvant mener aux études supérieures pour les jeunes de 11 ans de la région.

		1974	1975	1976
District de Bellinzona	1e année de GI	43	45	51
	1e année de SM	55	53	47
Région Tre Valli	1e année de GI	28	30	28
	1e année de SM	70	67	65

Source : idem.

Moins d'un tiers des élèves de 11 ans de la RTV choisissent le "Ginnasio", qui permet d'accéder au lycée et donc, éventuellement, aux études supérieures ; cette proportion ne se modifie pas, tandis qu'elle s'accroît toujours plus dans le district urbain de Bellinzona.

Rappelons que, dans la RTV, il n'y a que deux établissements de GI. Un autre facteur explicatif important du "choix" de la SM plutôt que du GI est le fait que la RTV est dans une situation sociologique défavorisée dont les principales caractéristiques sont : une plus grande proportion d'immigrés, une population ouvrière plus importante et aussi le fait que la majorité de ses habitants s'expriment dans le dialecte local. Il s'agit là de facteurs qui, au stade actuel des méthodes pédagogiques et, dans le cas spécifique des petites communes, en l'absence de moyens didactiques appropriés, reliés à une faible motivation à l'égard des études, sont la cause de la faible réussite scolaire.

L'enseignement post-obligatoire

En janvier 1976, les jeunes de la classe d'âge de 17 ans (2 années après la fin de la scolarité obligatoire), se répartissaient de la façon suivante, pour la RTV et le district urbain de Bellinzona :

	RTV (%)	Bellinzona (%)
- Au travail	20,7	14,0
- Apprentissage arts et métiers	32,8	28,4
- Apprentissage commercial	11,4	10,7
- Apprentissage de vente	3,6	4,5
- Ecoles professionnelles à plein temps	12,9	15,4
- en arts et métiers	0,6	2,1
- commerciales	9,0	9,9
- technique supérieure	1,5	1,1
- sanitaires	1,2	1,3
- agriculture	0,6	1,0
- Ecole normale	8,7	7,3
- Lycée	7,2	9,7
- Autres (*)	2,7	10,0
Total	100,0	100,0
- absolu	333	524

(*) Sous la rubrique "autres" se trouvent essentiellement les retardataires encore en 5e année de GI, dont beaucoup passeront au lycée.

Source : idem.

On peut donc constater, dans la RTV, par rapport à Bellinzona,

- que les jeunes, après l'obligation scolaire, sont moins scolarisés (79,3 % contre 86,1 %);
- qu'ils fréquentent en moindre proportion les écoles professionnelles à plein temps (12,9 % contre 15,4 %) et en plus grande proportion l'apprentissage dans les entreprises (47,8 % contre 43,7 %);
- qu'ils fréquentent moins le lycée (7,2 % contre 9,7 % et 8,5 % contre 13,1 % si l'on inclut la moitié des retardataires qui se trouvent au GI);
- qu'ils s'intéressent aussi très peu à l'école de formation agricole, bien que cette activité soit importante.

Soulignons encore qu'un tiers seulement des jeunes de la région suivent un apprentissage ou une école à plein temps qui les prépare à devenir ouvriers qualifiés. La grande majorité de ceux qui fréquentent des écoles aboutiront à une profession "tertiaire".

Les apprentis de toute classe d'âge sont au nombre de 555 (dont 168 femmes); 142 d'entre eux (25,6 %) n'ont pas de place d'apprentissage dans la région : ils travaillent ailleurs, surtout à

Bellinzona ; 437 d'entre eux (78,7 %) doivent suivre les cours hebdomadaires (1, 1 1/2 ou 2 jours) hors de la région.

Les cours professionnels les plus fréquentés sont les suivants :

	apprentis	dont femmes
- employé de commerce	107	82
- mécanique	68	-
- électricité	50	-
- dessin technique	42	4
- métallurgie	34	-
- construction	34	-
- vente	33	28
- bois	31	-
- automobiles	28	-
- hôtellerie	22	5
- confection	19	19
	468	138
	(84,3 % du total)	(82 % du total des femmes)

Source : idem.

D. ENSEIGNEMENT ET CONTEXTE REGIONAL

Enseignement et marché du travail

Nous avons vu quelles sont les branches économiques qui offrent le plus d'emplois dans la région. Nous avons également vu que l'industrie s'est considérablement développée tandis que l'agriculture est de plus en plus abandonnée.

Le système d'enseignement régional n'a pu faire face à cette évolution :

- L'enseignement agricole n'existe pas dans la région et l'institut cantonal agricole n'est presque pas fréquenté par les jeunes de la région. Le système d'enseignement n'a donc aidé en rien les paysans et leurs enfants à moderniser leurs méthodes de production et de gestion, ni à apprendre un second métier, de façon à pouvoir améliorer leurs revenus tout en restant dans l'agriculture ;
- Les nouveaux emplois industriels ne sont pas attrayants pour les jeunes de la région, qui préfèrent les conditions de travail et de revenu des emplois publics (administration cantonale et fédérale, chemins de fer fédéraux, postes et téléphones) et d'autres services privés. Les emplois industriels, même ceux qui auraient exigé une qualification professionnelle, ont été occupés par des immigrés étrangers non qualifiés, auxquels le système d'enseignement régional n'a su offrir des possibilités adéquates de formation.

- L'industrie, la construction et les carrières - trois des branches les plus importantes de la région - occupent beaucoup de manoeuvres (immigrés) mais elles manquent de travailleurs qualifiés. Pourtant la formation à des métiers dans la mécanique, la métallurgie, la construction est offerte dans la région, à Biasca, mais elle concerne moins d! 1/5 de tous les apprentis. En effet, ces jeunes n'aiment pas travailler dans les entreprises industrielles ni dans celles du bâtiment et du génie civil. Ils font plutôt leur apprentissage dans des entreprises artisanales (installations, électricité, garage, bureaux d'architectes, etc.) ou dans des bureaux et magasins (les jeunes filles). Les trois quarts des apprentis de la RTV sont recrutés par les entreprises de la région.

Enseignement et émigration

Ceux qui fréquentent des écoles professionnelles à plein temps, ou des écoles moyennes supérieures, dès l'âge de 14, 15 ou 16 ans, vivent pendant toute la semaine hors de la région, sauf les élèves de la "valle Riviera" (la moins montagnarde des trois vallées) qui fréquentent des établissements à Bellinzona. Ceci, une fois fait le choix professionnel, facilite le départ définitif de la région, dont le marché du travail a des possibilités limitées d'absorption de travailleurs très qualifiés, notamment dans les branches du secteur tertiaire. L'attrait de la vie urbaine, à laquelle on s'habitue pendant la période des études, peut aussi stimuler l'émigration.

Parmi les jeunes en apprentissage, un quart travaillent et suivent, dès 15 ans, les cours professionnels dans des villes hors de la région. Ils y acquièrent des spécialisations (certaines branches de la mécanique, électronique, dessin technique etc., ou une formation bancaire, comptable, administrative) qu'ils ne pourront généralement pas exercer (aux mêmes conditions du moins) dans la région.

Une partie des choix professionnels et scolaires des jeunes entre donc en contradiction avec la réalité régionale, qui n'offre que peu de possibilités de travail qualifié, notamment dans le secteur tertiaire, et peu de possibilités de formation.

Enseignement et contexte social

Par rapport à d'autres régions du canton la structure économique de la région Tre Valli implique une structure sociale à forte composante de paysans, de travailleurs de l'industrie et du bâtiment, souvent immigrés et peu ou pas qualifiés. Ceci signifie de plus grandes difficultés d'apprentissage. Le rôle de soutien de l'école doit être ici beaucoup plus important qu'ailleurs. Il faudrait adopter d'autres solutions pédagogiques, disposer d'autres moyens didactiques, doter les enseignants d'une formation spécifique. Faute de quoi, les taux d'échec depuis l'école primaire, les taux d'abandon du système d'enseignement, les taux de transfert vers des écoles qui préparent aux métiers manuels, continueront à être plus élevés que dans d'autres régions du canton. De telles solutions affectent directement l'"égalité des chances" et la promotion sociale de la population régionale.

Enseignement et contexte culturel

L'abandon de la région par les jeunes qui ont acquis une formation secondaire ou supérieure et même par les travailleurs et employés les plus qualifiés, la mauvaise adéquation de l'école obligatoire au contexte social, les insuffisances du système d'éducation des adultes - spécialement des travailleurs immigrés - et l'absence dans la région d'un institut d'enseignement qui puisse représenter un centre de rayonnement culturel (un lycée par exemple) entraînent un appauvrissement culturel, social et politique de la région dans son ensemble et de très nombreuses communautés villageoises, au préjudice de l'innovation et du développement économique.

E. LE PROGRAMME DE DEVELOPPEMENT DE LA RTV : PLACE DE L'ENSEIGNEMENT

Les objectifs de la région et les mesures pour les atteindre

Les objectifs fixés pour le développement économique et social de la région sont les suivants :

i) équilibre entre la population active potentielle et le nombre d'emplois offerts dans la région, en fixant un taux acceptable de pendularité extrarégionale ;
ii) équilibre entre les aspirations professionnelles et de revenu des jeunes et répartition des emplois à créer ;
iii) équilibre dans la répartition territoriale des lieux d'habitation, des lieux de travail et des lieux de prestation de services (hôpitaux, commerce, écoles, etc.) dans l'ensemble de la région ;
iv) équilibre entre la population totale et les infrastructures et services disponibles.

Pour atteindre le premier objectif, il faut créer, d'ici à 1990, 1 550 nouveaux emplois dans la région. Pour atteindre le deuxième, il faut modifier la structure économique, par le choix de nouvelles activités économiques à implanter dans la RTV, de façon telle que, en 1990 :

- le nombre des entreprises et des emplois dans l'agriculture soit moindre, mais chacun d'entre eux donne une plus grande valeur ajoutée ;

- l'importance relative, et absolue, du secteur secondaire (carrières, industrie et construction) soit réduite, et compensée par une plus grande importance (relative et absolue) des emplois dans le secteur des services. Dans ce domaine, on prévoit notamment le déplacement, de Bellinzona (hors de la RTV) à Biasca (centre principal de la RTV), de quelques secteurs de l'administration cantonale et le développement de deux nouvelles stations touristiques à double saison.

Pour atteindre les troisième et quatrième objectifs, on prévoit une politique de "décentralisation concentrée" des investissements productifs et d'infrastructure, et la création de services, de façon que la région soit structurée autour d'un "centre régional" (Biasca) et de 3 "sous-centres" complémentaires au centre régional.

Les objectifs de développement de l'enseignement

Ecole maternelle et école primaire

- Etendre l'offre d'enseignement préscolaire à toutes les communes ;
- Accélérer la réforme des programmes de l'école primaire actuellement en cours et faire en sorte que les nouveaux programmes soient réellement flexibles et permettent l'adaptation de l'enseignement aux exigences locales et régionales ;
- Assurer la participation des enseignants à l'élaboration de la réforme et les préparer à l'application positive des nouvelles méthodes ;
- Doter la région d'un centre de documentation en matière d'enseignement qui constituerait le lieu de rencontre des enseignants de la région et favoriserait les échanges d'expériences, le recyclage et le perfectionnement ;
- Poursuivre le regroupement des établissements scolaires des petites communes en une seule école intercommunale, où les enseignants disposent du cadre favorisant l'adoption de nouvelles méthodes d'enseignement et la réflexion critique sur leur expérience. Ce processus ne doit toutefois pas être poussé trop loin : il s'agit d'atteindre l'équilibre optimal entre les exigences d'une pédagogie nouvelle et le besoin de limiter les déplacements des écoliers de leur maison et de leur village.

Ecole moyenne

- Appliquer dans la région, dans les plus brefs délais, la loi cantonale en faveur de l'école moyenne unifiée (SMU), à la place de la SM et du GI ;

- Créer, pour ce faire, 3 établissements de SMU en plus des 2 GI existants : 1 dans la haute Valle Leventina, 1 dans la moyenne Leventina et 1 dans la moyenne Valle di Blenio. Cette "décentralisation concentrée" garantirait à chaque établissement un nombre suffisant d'élèves, un accès relativement facile et l'existence d'un petit centre culturel dans chaque zone de la région, dans chacun des "sous-centres" qui structurent la région autour du centre principal de Biasca.

Ecole moyenne supérieure (post-obligatoire)

On propose la création - à Biasca - d'une école moyenne supérieure intégrée, lors de la révision souhaitée de l'organisation actuelle de l'enseignement moyen supérieur. Sans l'unification de l'école normale et du lycée, on ne pourrait en effet disposer, dans la RTV, d'un nombre d'élèves suffisant (350-400) pour la création d'un lycée ou d'une école normale. Cette école, avec ses enseignants et ses étudiants, serait l'institution culturelle la plus importante de la région et devrait être mise au service de la formation des adultes et de l'animation culturelle générale de la région.

Enseignement professionnel (post-obligatoire)

- L'effectif d'élèves de la région qui fréquentent les écoles professionnelles à plein temps de type commercial (51 élèves de l'école cantonale de commerce et 44 de l'école cantonale d'administration) et de jeunes qui suivent un apprentissage d'employés de commerce et de bureau (107), justifie l'objectif suivant : la création dans le centre régional de Biasca d'une école de commerce et d'administration qui donnerait à la fois des cours à plein temps et des cours hebdomadaires pour les apprentis de ce secteur, ainsi que des cours de perfectionnement pour les employés travaillant déjà dans la région.
- On souhaite aussi offrir plus de possibilités de suivre des cours professionnels dans la région aux apprentis en arts et métiers. Mais la structure de cet enseignement - spécialisation relativement poussée dans des disciplines apparemment proches - semble être un grand obstacle à la réalisation de cet objectif.

Formation professionnelle des adultes

- Pour la formation technique et de gestion d'entreprise des agriculteurs, ainsi que pour leur formation à l'exercice d'activités secondaires (dans la maçonnerie, la menuiserie, la mécanique, l'artisanat "artistique", la gestion de petits magasins, auberges ou pensions touristiques), on prévoit la création dans la région d'un "centre de formation et d'animation agricole". Cette institution devrait travailler en liaison étroite avec l'école agricole cantonale (qui siège dans un district de la plaine) et les autres structures de la formation professionnelle dans la région. Les cours pour les agriculteurs seraient organisés de façon décentralisée, dans les différentes zones de la région.

- Pour la formation générale et la qualification professionnelle des travailleurs immigrés (ils sont plus de 4 000 dans la RTV, occupés surtout dans le bâtiment, les carrières et l'industrie), il s'agit de concevoir un système organique de formation, concerté entre le canton, les associations syndicales et d'entrepreneurs et les associations des immigrés eux-mêmes. Il devrait pouvoir s'appuyer sur les structures et le personnel de l'enseignement professionnel de base - soit dans les arts et métiers, soit dans les professions commerciales et administratives - et de l'école obligatoire et post-obligatoire. Ce système devrait répondre aux besoins spécifiques des immigrés mais - spécialement dans la formation professionnelle - doit être conçu dans le cadre d'une structure pour la formation de tous les adultes qui en ont besoin.

Objectifs de développement et objectifs de l'enseignement

- Les objectifs généraux du développement régional impliquent une modification des structures économiques et la création de nouveaux emplois surtout dans le secteur des services. Dans le secteur primaire (agriculture) et secondaire (construction, industrie), il s'agit d'améliorer la productivité, tout en acceptant une certaine diminution du nombre d'emplois.
- Les objectifs de l'enseignement dans le domaine professionnel - formation de base pour les jeunes et formation des adultes, particulièrement des immigrés - sont cohérents avec les objectifs ci-dessus. La priorité, pour les jeunes générations, est en effet attribuée au développement de l'enseignement commercial et administratif ; pour la formation agricole, on prévoit un système d'enseignement dans la région, surtout à l'intention des adultes. De même, pour la formation aux professions de l'industrie et de la construction, on met l'accent sur la nécessité de requalifier les travailleurs immigrés, auxquels on a dû recourir pour occuper des emplois qui n'étaient pas attrayants pour les jeunes générations suisses.

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- Les objectifs aux niveaux de l'enseignement préscolaire et primaire, de l'école moyenne qu'on veut unifier et de l'enseignement secondaire (école moyenne supérieure intégrée), ne peuvent qu'améliorer le niveau culturel, stimuler une plus grande liberté de choix des filières scolaires et des professions, et améliorer les possibilités d'accès à l'enseignement supérieur de la jeunesse montagnarde.
  La région étant petite, et la structure économique - même si elle est modifiée en fonction des buts de la politique de développement - n'étant ni très diversifiée ni riche en possibilités d'emplois hautement qualifiés, cette politique de l'enseignement risque dans une certaine mesure de stimuler l'abandon de la région. Ceci est évidemment en contradiction avec l'objectif général de garder dans la région l'ensemble de la population potentielle, active et totale.
  Ce problème met en lumière les limites et les contradictions inévitables d'une politique de développement économique et social au niveau d'une très petite région, et, plus généralement, la contradiction entre la division sociale du travail et la démocratisation de l'enseignement.

Objectifs de l'enseignement dans la RTV et politique cantonale de l'enseignement

- L'objectif visant à élargir l'offre d'enseignement préscolaire (école maternelle) à toutes les communes dépasse l'objectif établi par le canton qui consiste à doter d'une école maternelle toute commune d'au moins 400 habitants. Cela ne signifie pas vouloir une école maternelle avec un enseignement à plein temps dans toutes les communes, ni seulement organiser le transport des enfants vers les communes où siège une école maternelle.
  Des solutions peuvent être étudiées : une école maternelle à mi-journée, ou pendant quelques jours de la semaine, avec la participation des mères à sa gestion, etc.
- L'assouplissement des programmes pour mieux adapter l'enseignement primaire à la réalité locale n'est pas un principe acquis, mais les organes cantonaux responsables de l'enseignement ont mis à l'étude une réforme qui va dans ce sens.
- La création d'un centre de documentation en matière d'enseignement dans la RTV est prévue par le canton, mais sans engagement précis, pour les années 1979-1983. Pour réaliser le centre, la région devra insister auprès des autorités cantonales.

- La politique cantonale de localisation des écoles moyennes unifiées dans la RTV, bien qu'elle ne soit pas encore définitivement adoptée, ne coïncide pas exactement avec l'objectif visant à doter chaque "sous-centre" régional d'un établissement de ce type. Il peut y avoir conflit dans un seul cas (moyenne Valle Leventina).
- L'école moyenne supérieure intégrée (lycée et école normale) est encore au niveau de la politique cantonale, à l'état de projet. Sa réalisation est indispensable pour que la RTV puisse avoir une école moyenne supérieure.
- Dans le domaine de la formation professionnelle des jeunes (tant dans les écoles à plein temps que dans les cours pour apprentis, tant dans le domaine commercial que dans celui des arts et métiers), il n'y a aucune politique définie au niveau cantonal. Mais il y a, d'une part, des résistances au changement, et, d'autre part, une législation fédérale qui restreint la marge de manoeuvre du canton. La région aura donc beaucoup de peine à imposer ses besoins. La contradiction est particulièrement évidente dans le domaine des cours pour apprentis en arts et métiers : l'excessive spécialisation (à titre d'exemple le groupe "mécanique" comprend 13 professions) et l'organisation de cet enseignement spécialisé, empêchent de réunir dans la région un nombre suffisant d'élèves pour organiser d'autres cours formant à de nombreuses professions.
- Dans le domaine de la formation professionnelle des adultes, en particulier des immigrés, il manque une politique cantonale. La région ne peut donc que stimuler le canton à assumer la planification de l'enseignement dans ce domaine trop négligé. Quant à la formation agricole des adultes, les expériences, gérées par un service du canton, restent très limitées. La question pourra être examinée dans le cadre de la révision en cours de la loi cantonale sur l'agriculture et de la réorganisation, elle aussi en cours, de l'enseignement agricole de base au niveau cantonal.

LA REGION VIEGE-OUEST RAROGNE DANS LE CANTON DU VALAIS

A. CARACTERISTIQUES DE LA REGION

La région Viège-Ouest Rarogne compte 32 communes dont la situation géographique, la grandeur et la structure économique sont très différentes. La population résidente est passée de 20 367 personnes en 1950 à 27 663 habitants en 1970 pour atteindre environ 28 500 personnes aujourd'hui. Bien que cette croissance démographique régionale entre 1950 et 1970 ait dépassé légèrement la moyenne suisse, la région a toutefois subi, durant cette même période, une émigration qui a atteint un cinquième au moins de l'excédent régional des naissances.

L'économie de la région Viège-Ouest Rarogne a subi de profondes mutations depuis 1950. La part de la population active relevant du secteur primaire a diminué de 37 à 14 %.(1) En revanche, celle du secteur secondaire a augmenté de 38 à 46 % et celle du secteur tertiaire de 25 à 40 %. Les trois branches économiques qui prédominent sont l'industrie chimique, la construction et l'hôtellerie. A elles trois, elles représentent environ 45 % des emplois de la région. Ces emplois sont relativement concentrés (industrie chimique, centres touristiques), ce qui provoque des mouvements pendulaires importants au sein de la région, concernant dans certaines communes, plus de 50 % de la main-d'oeuvre.

Le revenu moyen régional par habitant atteint à peu près les trois quarts de la moyenne suisse.

La cause principale de l'émigration est le manque d'emplois attractifs. En conséquence l'émigration coïncide très souvent avec l'entrée dans la vie active. La pyramide des âges traduit clairement ce phénomène : en 1970 41 % de la population de cette région appartenaient aux classes d'âges 0 à 19 ans (ensemble de la Suisse 31 %), 51 % aux classes 20 à 64 ans (Suisse 58 %) et 8 % aux classes regroupant les personnes de plus de 65 ans (Suisse 11 %). Cette

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1) Ces chiffres comprennent un grand nombre de personnes travaillant à temps partiel (agriculteurs exerçant cette activité à côté de leur emploi principal). C'est la raison pour laquelle le pourcentage dans le secteur primaire est encore relativement élevé.

évolution démographique s'est évidemment répercutée sur l'enseignement et la formation dans la région. Un quart environ de la population régionale fréquente un des établissements scolaires existant dans la région Viège-Ouest Rarogne et dans les régions avoisinantes (les hautes écoles et les écoles techniques supérieures ne sont pas comprises dans cette évaluation). Le nombre des locaux scolaires a donc dû être augmenté très rapidement. C'est ainsi que de 1960 à 1975, 15 bâtiments scolaires totalisant 170 salles de classe ont été construits dans la région (écoles professionnelles non comprises).

A la fin de 1975, deux autres écoles étaient en construction et trois autres à l'étude. Malgré les efforts consentis, les conditions restent très insatisfaisantes dans certaines communes. Mais, d'un autre côté, on observe dans certaines communes une sous-occupation des locaux scolaires (salles de classe vides) par suite du recul de la natalité, de l'émigration à l'intérieur de la région et, aussi du fait de la nouvelle organisation du degré supérieur de l'école primaire.

B. L'OFFRE D'ENSEIGNEMENT DANS LA REGION

Le système d'enseignement cantonal

Dans le canton du Valais, la scolarité obligatoire commence à l'âge de 6 ans (début de l'année scolaire en automne). Après 6 années d'école primaire, l'élève passe au cycle d'orientation.

De la 7e à la 9e année scolaire tous les élèves fréquentent le cycle d'orientation, à l'exception des élèves des classes spéciales (handicapés) et de ceux qui entreront au gymnase au début de leur 9e année de scolarité. Le cycle d'orientation permet un premier tri des élèves, qui s'opère en relation avec la formation professionnelle envisagée. Il s'agit de choisir la section A ou B. La section A prépare surtout aux études générales et mène aux différentes sections de l'école secondaire du 2e cycle. La section B est en revanche fortement orientée vers l'apprentissage d'une profession ou d'un métier ; elle est complétée par les classes pratiques (Werkklassen). La répartition des élèves entre les deux sections s'opère sur la base des résultats scolaires obtenus au cours des 5e et 6e années du primaire. Le passage d'une section à l'autre est toujours possible. La fin du cycle d'orientation coïncide avec la fin de la scolarité obligatoire.

L'offre d'enseignement dans la région

Ecole enfantine

22 des 32 communes comptent au moins une école enfantine. On estime aux 9/10 la proportion des enfants qui ont la possibilité d'aller à l'école enfantine.

L'OFFRE D'ENSEIGNEMENT DANS LA REGION

L'existence d'une ou plusieurs écoles
dans une commune a été indiquée par un *

	Ecole maternelle	Ecole primaire	"Haushaltungsschule"	"Abschlussklasse"	"Sekundarschule"	"Progymnasium"	"Gymnasium"	Ecole professionnelle	Ecole spéciale	Classes de développement
Ausserberg		*								
Baltschieder	*	*								
Blatten		*								
Bürchen	*	*								
Eggerberg		*								
Eischoll		*								
Eisten		*								
Embd		*								
Ferden	*	*								
Grächen		*								
Hohtenn		*								
Kippel		*	*	*	*	*				
Lalden		*								
Niedergesteln		*								
Randa		*								
Raron	*	*	*	*	*					
Saas-Almagell		*								
Saas-Balen		*								
Saas-Grund	*	*	*	*	*					
Saas-Fee	*	*								
St. Niklaus	*	*			*					*
Stalden	*	*	*	*	*					
Staldenried		*								
Steg	*	*	*	*						*
Täsch	*	*								
Törbel		*								
Unterbäch	*	*								
Visp	*	*	*	*	*			*	*	*
Visperterminen	*	*	*							
Wiler	*	*								
Zeneggen		*								
Zermatt	*	*		*	*					*

Source : Programme de développement de la région Viège-Ouest Rarogne. Mimeo.

Ecole primaire

A l'heure actuelle, la région Viège-Ouest Rarogne compte 38 écoles primaires, au moins une par commune.
L'école primaire est donc fortement décentralisée. Cette décentralisation s'exprime également dans le rapport existant entre les classes à un seul niveau et celles à plusieurs niveaux. Sur les 154 classes primaires pour l'année scolaire 1974/75, il y en avait 68 à un seul niveau, le reste étant à deux niveaux ou plus. Dans un seul cas, les 6 niveaux primaires étaient réunis dans une classe unique. L'effectif moyen d'une classe se situe autour de 25 élèves.

Classes de développement et écoles spéciales

Pour compléter l'enseignement primaire ordinaire, il existe, dans les localités importantes, des classes de développement ; elles déchargent les classes primaires des élèves en retard dans leur développement et dispensent à ces élèves un enseignement qui leur est adapté.
Pour les élèves qui ont de grandes difficultés dans leur scolarisation, il y a une école spéciale dans la région et deux autres écoles de ce genre se trouvent dans les régions voisines.

Le cycle d'orientation

Le cycle d'orientation est concentré sur six implantations. En outre, quelque 50 élèves de deux communes fréquentent le cycle d'orientation d'une région voisine.

Le gymnase et la formation professionnelle

Dans le domaine de l'enseignement et de la formation postscolaires, c'est-à-dire après la scolarité obligatoire, la région Viège-Ouest Rarogne possède une école professionnelle à Viège, école qui est surtout orientée vers la métallurgie de transformation et la chimie. Les apprentis de professions commerciales, les futurs dessinateurs, les apprentis du bâtiment et du génie civil ainsi que ceux des métiers du bois, etc. suivent les cours de l'école professionnelle de Brigue, centre de la région voisine où se trouvent aussi les écoles secondaires.
Viège compte également une école d'agriculture, une école ménagère rurale (économie familiale) et une école d'infirmières rattachée à l'hôpital.

ELEVES DES DIFFERENTES ECOLES DE LA REGION SELON L'ORIGINE SOCIO-ECONOMIQUE

	Ecole primaire		Ecole enfantine		Classe de développement		Ecole spéciale		"Abschluss- und Haushaltungsschule"		"Sekundarschule"		"Gymnasium und Sek. Latein"		"Handelsschule"		Ecole normale		Ecole professionnelle		Total	
		%		%		%		%		%		%		%		%		%		%		%
Sans indication	113	2.7	9	1.5	2	2.6	9	8.7	29	7.6	28	3.6	5	2.4	2	1.9	6	5.2	58	10.0	261	3.6
Ménagères	38	0.9	2	0.3	1	1.3	-		11	2.8	5	0.6	-		3	2.8	5	4.3	18	3.1	83	1.2
Cadres supérieurs	222	5.3	68	11.5	1	1.3	3	2.9	6	1.6	48	6.1	70	33.3	11	10.2	11	9.5	6	1.0	446	6.3
Employés	493	11.8	105	17.5	5	6.4	10	9.6	22	5.8	102	13.0	33	15.7	13	12.0	17	14.7	45	7.8	845	11.8
Agriculteurs	134	3.2	4	0.7	4	5.1	7	6.7	29	7.6	35	4.4	4	1.9	-		2	1.7	31	5.4	250	3.5
Artisans	673	16.1	89	15.1	2	2.6	6	5.8	27	7.1	132	16.8	39	18.6	26	24.1	13	11.2	75	13.0	1082	15.2
Ouvriers	2506	60.0	314	53.1	63	80.8	69	66.3	257	67.5	437	55.5	59	28.1	53	49.1	62	53.4	345	59.7	4165	58.4
Total	4179	100	591	100	78	100	104	100	381	100	787	100	210	100	108	100	116	100	578	100	7132	100
	58.6		8.3		1.1		1.4		5.4		11.0		2.9		1.5		1.7		8.1			100

Source : idem.

C. LA DEMANDE D'EDUCATION

Même si l'on tient compte de l'importance de la distance que doivent parcourir les élèves pour juger de leur fréquentation des écoles, on constate cependant, en étudiant les données disponibles, que l'origine sociale joue un rôle important dans les résultats scolaires et dans le choix de la poursuite des études ou de la formation. Au cours de l'année scolaire 1973/74, 6 541 élèves ont fréquenté l'école obligatoire (y compris les classes de développement et les écoles spéciales) ainsi que les écoles secondaires et les écoles professionnelles ; 358 (5,8 %) d'entre eux provenaient de familles de cadres, tandis que 3 851 (59 %) étaient issus de familles d'ouvriers ou d'employés. Parmi ces enfants, ceux des familles de cadres qui fréquentaient les classes de développement ou les classes spéciales représentaient 1,1 % de leur catégorie, tandis que les enfants issus de familles de travailleurs atteignaient un pourcentage de 3,4 %. Pour l'école professionnelle, les pourcentages respectifs étaient de 1,6 % (cadres) et de 9 % (travailleurs). Pour le gymnase, ils s'élevaient à respectivement 18,5 % et 1,5 %. Pour plus de détails voir le tableau suivant "Elèves des différentes écoles de la région selon l'origine socio-économique". L'expansion générale de l'enseignement et de la formation dans la région de Viège-Ouest Rarogne a provoqué une forte augmentation de la proportion des jeunes gens qui fréquentent une école secondaire ou une école professionnelle. Cette expansion a été déterminée en grande partie par la forte industrialisation à Viège et le développement du tourisme dans la région.

D. LE CONCEPT DE DEVELOPPEMENT : LA PLACE DE L'ENSEIGNEMENT

La région ne peut pas élaborer une politique indépendante en matière d'enseignement et de formation. Ses efforts doivent nécessairement se concentrer sur la réalisation rapide, conforme aux particularités régionales, des buts fixés par le canton.

Mais ceci n'exclut nullement que certaines divergences d'opinion naissent entre la région ou ses communes, d'une part, et le canton, d'autre part. C'est le cas de la région Viège-Ouest Rarogne. Avant de présenter brièvement les objectifs régionaux en matière d'enseignement et de formation, il convient de mentionner encore quelques éléments et buts du développement socio-économique parce qu'ils ont une importance certaine pour la formation. En effet, on prévoit que la natalité continuera à baisser. Il s'ensuivra que diverses communes de la région ne pourront bientôt plus supporter la charge financière d'une école primaire comprenant plusieurs classes.

De plus, la part du secteur primaire diminuera encore au profit de celle du secteur tertiaire, au sein duquel l'importance du tourisme se confirmera toujours plus. En outre, le secteur secondaire ne se modifiera guère. En revanche, des modifications internes à ce secteur se produiront puisque la régression de l'emploi dans la construction devrait être compensée par une augmentation dans l'industrie. On s'attend aussi que la main-d'oeuvre extérieure à la région (surtout les frontaliers et les saisonniers) diminue encore ces prochaines années et que, par conséquent, l'occupation de la main-d'oeuvre indigène augmente dans le tourisme et l'industrie. Cela pourrait avoir des répercussions sur la formation professionnelle.

Sur le plan régional, l'enseignement et la formation visent trois objectifs qui sont valables pour tout le canton :

i) Permettre, autant que possible, à chaque enfant d'acquérir la formation pour laquelle il présente le plus d'aptitudes ;

ii) Intégrer l'enfant dans un milieu social plus large que la famille ;

iii) Permettre à chaque élève achevant sa scolarité obligatoire d'entreprendre et de mener à bien dans le Haut-Valais la formation professionnelle qu'il choisit et pour laquelle il existe des perspectives d'emploi dans cette région.

Jusqu'ici, il n'y a pas encore de conflit entre la région et le canton. Toutefois, pour atteindre le deuxième des objectifs précédents il convient, en partie du moins, de déroger aux normes fixées par le canton. C'est ainsi que l'école doit contribuer à retenir la population des communes de montagne en offrant à l'enfant, d'une manière ou d'une autre, la possibilité de fréquenter l'école le plus longtemps possible près de son lieu de domicile. Compte tenu du faible effectif des élèves dans maintes communes, il serait donc nécessaire de modifier les règlements cantonaux au sujet de l'effectif minimum des classes primaires et enfantines. Il est évident que ce postulat n'est pas forcément compatible avec les ressources financières du canton et des communes, ni avec les efforts entrepris pour améliorer la qualité de l'enseignement.

Pour améliorer l'égalité des chances d'accès aux études secondaires supérieures (gymnase), la décentralisation des progymnases (cycle d'orientation) a été réalisée dans le Haut-Valais. Cette solution présente aussi l'avantage de revaloriser les centres scolaires régionaux.

La construction d'écoles de métiers est nécessaire, mais elle présuppose une collaboration entre les régions du Haut-Valais. Cette remarque vaut également pour l'école technique supérieure et l'école professionnelle supérieure dont les perspectives de création sont plus lointaines.

Pour tenir compte de l'importance croissante du tourisme, il est juste de mettre l'accent sur l'amélioration indispensable de la formation dans les professions qui s'y rattachent.

En conclusion, il convient de rappeler que la région Viège-Ouest Rarogne pose, en matière d'enseignement et de formation, diverses revendications qui ne correspondent pas entièrement aux buts du canton. Cette divergence est nette dans la revendication d'un abaissement de l'effectif minimum des élèves dans les classes primaires et enfantines.

LE CAS DU CANTON D'URI:
UNE "REGION-CANTON"

A. CARACTERISTIQUES DE LA REGION

Au cours des cent dernières années, la population du canton d'Uri a doublé pour atteindre 34 000 habitants. Cette augmentation est due à une forte natalité. Cependant cette croissance, qui peut paraître élevée, ne doit pas cacher le fait que, chaque année, en moyenne 200 jeunes Uranais ont dû quitter le canton, faute de pouvoir trouver un emploi convenable sur place.

Pour limiter cette émigration, le canton s'est employé à développer les activités industrielles et tertiaires. Ces vingt dernières années, l'économie a connu des mutations profondes, la part de l'agriculture diminuant de moitié (24 % à 13 %), alors que le secteur secondaire est passé de 42 % à 51 % et que le secteur tertiaire s'est maintenu aux environs de 35 %. Cette évolution a également été marquée par une concentration de plus en plus forte des activités et de la population dans la plaine de la Reuss. Aujourd'hui, 70 % des habitants résident dans les sept communes de la vallée.

Dans les treize autres communes, les problèmes démographiques se posent avec acuité : neuf d'entre elles enregistrent une perte de population au cours de la période, pourtant prospère, de 1960 à 1970.

Certains villages se trouvent aujourd'hui au minimum démographique nécessaire pour assurer une vie normale de la communauté. Il y a d'ailleurs très peu de vie économique propre dans ces zones marginales ; les mouvements pendulaires journaliers sont une caractéristique de l'économie uranaise puisqu'ils concernent 30 % des personnes actives.

Le revenu par habitant atteint 83 % de la moyenne suisse. Les collectivités locales et cantonale se trouvent dans une situation financière difficile ; par rapport à leurs ressources propres, l'endettement est très élevé.

Dans douze communes, les dépenses pour l'instruction publique constituent plus de la moitié des dépenses totales (moyenne des communes : FS. 250 par habitant en 1972).

L'enseignement représente donc une lourde charge pour les communes de montagne et malheureusement l'effort consenti dans ce domaine est souvent perdu par le fait de l'émigration.

L'OFFRE D'ENSEIGNEMENT DANS LE CANTON D'URI

année scolaire 1975/76 (nombre d'élèves)

	Ecole maternelle	Ecole primaire	Hilfs- und Sonderschule (Ecole spéciale)	Abschlussklasse (Classe terminale cycle obligatoire)	Werkschule (Classe atelier)	Ecole secondaire	Realklasse	Unterrealschule (1er cycle secondaire)	Oberrealschule (lycée scientifique)	Gymnasium (lycée littéraire)	Ecole normale
CANTON	519	4 284	152	487	17	950	15	86	97	237	73
Altdorf	160	911	89	89	17	207	15	86	97	237	73
Andermatt	38	215		20		73					
Attinghausen	29	155									
Bauen		18									
Bürglen	63	450		66		54					
Erstfeld	79	559	31	56		137					
Flüelen	29	202	32	30		69					
Göschenen	21	108		28							
Gurtnellen		101		28		75					
Hospenthal		41									
Isenthal		100									
Realp		29									
Schattdorf	79	475		73		115					
Seedorf	21	176		47		89					
Seelisberg		91				30					
Silenen		292		38		74					
Sisikon		49									
Spiringen		141		40		27					
Unterschächen		100									
Wassen		71									

Source : Statistiques scolaires du canton d'Uri.

Pour mieux maîtriser ses problèmes de développement, le canton d'Uri a mis sur pied, dès 1973, un programme régional.

B. L'OFFRE D'EDUCATION

L'organisation scolaire

Les jardins d'enfants (non obligatoires), les écoles des cycles primaire et secondaire ainsi que les écoles spéciales sont du ressort des communes.

Chaque commune à la possibilité d'introduire une neuvième année obligatoire.

Surtout en ce qui concerne les cycles secondaires, lorsque l'effectif descend en dessous d'un certain seuil, les communes doivent procéder à des regroupements scolaires.

Les deux gymnases ainsi que l'école normale sont des institutions privées en passe d'être reprises par le canton. Le canton ne possède aucun établissement technique de niveau supérieur ou universitaire.

L'offre d'éducation dans la région-canton

Du point de vue de l'économie régionale, il importe non seulement de connaître l'organisation du système d'enseignement, mais également de savoir si l'offre d'éducation est à la portée de la population et plus particulièrement à la portée des zones marginales.

L'infrastructure scolaire peut être illustrée de la façon suivante : toutes les communes disposent de leur propre école primaire et certaines en possèdent même plusieurs. Lorsqu'il y a possibilité, la norme est de réaliser, dans la mesure du possible, des classes à un niveau. Ceci n'est toutefois pas un principe absolu : lorsque les effectifs ne sont pas suffisants, il existe des classes à plusieurs niveaux. On compte même, dans les petits villages de Maien et d'Urnerboden, des classes comprenant tous les niveaux du cycle primaire. Dans plusieurs communes, étant donné la diminution des naissances, il faut s'attendre à des problèmes d'effectifs et de maintien de certaines classes.

Pour les écoles secondaires, leur localisation crée certains problèmes : les communes marginales sont relativement désavantagées ; les élèves des centres ont des possibilités plus grandes d'instruction supérieure.

Pour sa planification, le canton a précisément voulu lutter contre les inconvénients signalés en rapprochant les établissements scolaires de la population (par exemple, Spiringen, Schächental) et en améliorant la qualité de l'offre scolaire (école régionale de l'Oberes Reusstal).

L'importance de ces établissements ne doit pas être mesurée seulement en fonction de l'enseignement qui y est dispensé mais en tant que foyers d'animation culturelle (bibliothèque, théâtre) et sportive (salle de gymnastique, piscine) du milieu concerné.

Soulignons aussi le rôle d'animateur que remplit le personnel enseignant dans de telles régions. D'une étude réalisée dans une autre région de montagne, il ressort que les 15 enseignants du secondaire résidant dans la vallée avaient tous une ou plusieurs activités sociales, culturelles ou économiques.

Au niveau des Gymnasien cantonaux (préparation aux différents types de maturité) les jeunes filles sont sous-représentées et forment à peine 30 % des effectifs.

C. LA DEMANDE D'EDUCATION

Comme on peut le constater d'après le tableau concernant l'offre d'enseignement, l'absence d'écoles enfantines dans plusieurs petites communes détermine la faible demande d'éducation pour le secteur préscolaire.

Seules 9 communes sur 21 disposent d'une école enfantine, ce qui signifie un taux de scolarisation relativement bas puisque l'école n'accueille pas des enfants d'autres communes.

La mesure la plus représentative de la demande d'éducation est la répartition des élèves entre l'école moyenne (Mittelschule), l'école secondaire (Sekundarschule) et les classes de fin de scolarité (Abschluss-Werkschule).

Les pourcentages suivants montrent les disparités entre les différentes communes du canton et la moyenne cantonale.

REPARTITION DES ELEVES DANS LES DIFFERENTES
ECOLES SECONDAIRES DU PREMIER CYCLE

	"Mittelschule"	"Sekundarschule"	"Abschluss/Werkschule"
CANTON	10,66 %	55,47 %	33,87 %
Hospental	37,5	37,5	25
Attinghausen	24,5	37,9	37,9
Altdorf	23,9	44,2	31,9
Realp	12,5	25	62,5
Sisikon	12,5	37,5	50
Schattdorf	12,2	62,2	25,6
Erstfeld	7,9	69,7	22,4
Seedorf	4,2	62,5	33,3
Bürglen	3,6	55,4	41
Silenen	3,2	54,8	42
Andermatt	3,1	78,1	18,8
Flüelen	3	57,6	39,4
Bauen	0	50	50
Göschenen	0	41,7	58,3
Gurtnellen	0	75	25
Isenthal	0	52,4	47,6
Seelisberg	0	94,4	5,6
Spiringen	0	21,4	78,6
Unterschächen	0	58,8	41,2
Wassen	0	58,3	41,7

Source : idem.

D. LE PROGRAMME DE DEVELOPPEMENT : PLACE DE L'ENSEIGNEMENT

La participation dans l'élaboration du programme

Les responsables de l'Institut d'économie rurale, chargés de l'élaboration de ce programme, se sont préoccupés aussi de sensibiliser la population et les communes du canton à leurs travaux.

Cette sensibilisation s'est effectuée à plusieurs niveaux, en utilisant des techniques différentes :

- distribution à tous les ménages d'une brochure (Uri hit und moral) contenant les principaux points proposés dans le programme, avec un appel à la collaboration de chacun ;
- discussion publique dans chaque commune avec la participation de techniciens et de représentants du Conseil d'Etat (Exécutif cantonal) ;
- introduction, dans le programme de certains cours professionnels pour adultes, de certains problèmes spécifiques liés à la définition du programme.

La préparation du document s'est faite en étroite collaboration avec le Conseil d'Etat, si bien que le programme de développement régional a été adopté par le gouvernement cantonal.

Ont, en outre, participé à l'élaboration du programme six groupes de travail, composés chacun d'une dizaine de personnes et de spécialistes dans diverses disciplines. Chaque groupe de travail s'occupait d'une des six sous-régions en lesquelles le canton avait été subdivisé. L'élaboration du programme a requis deux années de travail.

Les objectifs fondamentaux

Les objectifs du développement économique et social du canton-région sont essentiellement les suivants :

i) maintien d'une légère croissance de population dans le canton ;
ii) maintien de la répartition actuelle de la population entre la vallée de la Reuss et les autres communes ;
iii) maintien de la vitalité des zones marginales ;
iv) maintien des emplois concentrés dans la vallée de la Reuss et amélioration des communications entre lieu de travail et lieu de résidence ;
v) création, dans la mesure du possible, d'emplois décentralisés.

Tous ces objectifs, peu ambitieux à première vue, nécessitent déjà des moyens importants pour être réalisés. Un catalogue impressionnant de mesures destinées à atteindre ces objectifs a été établi.

Les objectifs du développement de l'enseignement et les mesures pour les atteindre

Amélioration du programme d'enseignement dans les différents cycles en actualisant la matière enseignée. Une collaboration étroite avec les cantons de Suisse centrale est indispensable.

Des propositions précises ont été émises :

- ouverture aux problèmes du développement économique régional et en particulier du tourisme, aux problèmes d'hygiène et d'écologie ;
- développement de l'information professionnelle ;
- introduction de l'enseignement du latin dans les écoles secondaires pour permettre aux élèves des zones marginales d'entrer plus tard au gymnase ;
- organisation de cours pour adultes, si possible dans toutes les communes, par l'université populaire ;
- dans les écoles d'agriculture, préparation des jeunes agriculteurs aux métiers secondaires (polyvalence des activités).

Amélioration du système scolaire et de son fonctionnement :

- organisation du transport scolaire en collaboration étroite avec celui des ouvriers ; subvention des frais de transport jusqu'à 75 % ;
- allocation différenciée des bourses d'études et d'apprentissage, en fonction du lieu de domicile ;
- adaptation de l'horaire des écoles professionnelles à celui des transports pour les élèves des zones marginales ;
- meilleure utilisation des bâtiments scolaires ;
- amélioration des possibilités de passage entre les différentes filières de scolarisation ;
- création de postes d'enseignants itinérants pour certaines matières (latin, gymnastique).

Amélioration de l'infrastructure scolaire :

Un programme de réalisations a été mis sur pied, prévoyant, selon les cas, la construction, l'agrandissement ou la rénovation des bâtiments scolaires (8 projets pour un montant total de 22 millions de francs suisses).

L'agrandissement de l'école professionnelle d'Altdorf est également prévu. D'autre part, l'activité des classes de développement d'Altdorf sera étendue.

E. CONCLUSION

La planification scolaire cantonale, entreprise avant le programme de développement, allait déjà dans le sens recherché actuellement.

Il ne s'agit donc pas de recommencer une nouvelle planification: les objectifs et les mesures proposés dans le programme de développement doivent permettre une adaptation aux besoins actuels, en tenant compte plus particulièrement des zones marginales.

Les trois principales améliorations à apporter au système adopté jusqu'ici sont :

- Assouplissement des filières afin de permettre des changements d'options en cours d'études.
- Formation diversifiée pour encourager la polyvalence des activités professionnelles.
- Amélioration permanente de l'apport de l'école à l'ensemble de la population, surtout dans les régions désavantagées.

IV. SYNTHESE DES ETUDES DE CAS

1. LES CARACTERISTIQUES DES REGIONS DE MONTAGNE CONSIDEREES

Les caractéristiques socio-économiques

Du point de vue démographique, les trois régions se caractérisent par une augmentation de la population due à un bilan naturel positif (taux de natalité relativement élevé et/ou immigration de travailleurs étrangers). Par contre, le solde migratoire des Suisses est toujours négatif : l'exode de la population autochtone vers la plaine, les centres urbains, est assez important et touche surtout la population active jeune, d'où déséquilibre de la structure de la population (le pourcentage élevé de jeunes qui ne sont pas encore entrés dans la vie active et de personnes âgées).

Du point de vue économique :

- Plus de la moitié des ressources de certaines communes sont absorbées par l'éducation des enfants.
- Le secteur agricole, par rapport au reste de la Suisse, est relativement important (12 à 14 % de la population active) ; mais dans les trois régions, on a assisté au cours des dernières décennies à une forte diminution de la population agricole et à une augmentation du nombre d'actifs dans les autres secteurs économiques.
- Le développement de ces secteurs s'est effectué grâce à l'expansion de deux ou trois branches économiques principales : la chimie, pour la région valaisanne, la métallurgie pour la région tessinoise, et par le tourisme et la construction en général.
- Le développement industriel s'est effectué en grande partie avec l'utilisation de techniques de production qui demandent peu de main-d'oeuvre qualifiée et en recourant souvent à la main-d'oeuvre étrangère. Ceci explique la restriction des types de qualification professionnelle demandés dans la région.

Il y a une insuffisance quantitative et qualitative des emplois par rapport à la main-d'oeuvre disponible. Les mouvements pendulaires journaliers ou hebdomadaires de la population active vers d'autres régions sont très importants. Cette situation favorise l'exode définitif de la population. Le manque d'emplois de haute qualification provoque, en outre, l'abandon de la région par les jeunes les mieux formés.

Les caractéristiques de l'offre d'enseignement

En général, l'offre d'enseignement dans la région est insuffisante. Bien qu'elles soient difficiles à mesurer, les conditions de travail dans les écoles des zones de montagnes semblent moins bonnes qu'ailleurs. Ces remarques valent surtout pour les deux régions sous-cantonales. Pour le canton d'Uri, par contre, il existe des différences à l'intérieur même du canton.

L'école maternelle

Plus de la moitié des communes n'ont pas d'école maternelle. Il s'agit évidemment des toutes petites communes ayant très peu d'enfants de cet âge à scolariser, dont la scolarisation demanderait un investissement disproportionné aux moyens disponibles.

L'école primaire

A l'exclusion de la région tessinoise, qui compte 8 écoles intercommunales, chaque commune dispose en général de sa propre école primaire, qui représente souvent pour elle un lourd fardeau financier. Cependant, la proposition de fermer l'école de la commune pour créer une école intercommunale rencontre le plus souvent l'opposition de la population. Les classes à plusieurs niveaux sont donc nombreuses.

Les écoles secondaires du premier cycle

Les écoles préprofessionnelles ou celles qui mènent les élèves aux écoles professionnelles sont beaucoup plus décentralisées que les établissements qui conduisent aux études longues. Ces derniers n'existent généralement que dans le principal centre régional, ce qui impose aux élèves de longs déplacements.

Les écoles secondaires du deuxième cycle

Dans la plupart des cas, les élèves doivent quitter la région pour accéder à ce type de formation :

- Formation générale :
  dans la "Regione Tre Valli" il n'y a pas de "Liceo" ; dans celle de Viège-Ouest Rarogne, il n'y a pas de gymnase.

- Formation professionnelle :
  la formation à la plupart des professions est dispensée dans des centres situés en dehors de la région.

Les caractéristiques de la demande d'éducation

Que ce soit en termes de taux de transition d'un niveau inférieur au niveau supérieur ou de taux de scolarisation, il ressort clairement des études de cas que les enfants et les jeunes des zones de montagne sont défavorisés. Ils sont nettement sous-représentés dans les écoles secondaires préparant aux études supérieures ; le pourcentage de redoublants est plus élevé que dans les autres zones ; les places d'apprentissage sont limitées et n'existent que pour quelques branches professionnelles.

Les causes de cette situation sont essentiellement :

- l'insuffisance de l'offre d'enseignement : absence de certaines écoles, difficultés d'accès, (distance habitation/école), inadéquation des méthodes et moyens pédagogiques par rapport à la situation spécifique de ces zones.
- la structure socio-économique de la population : la population agricole et ouvrière est plus importante qu'ailleurs, plus grande proportion d'étrangers avec une faible formation professionnelle (dans la région tessinoise).
- Le revenu moyen de la population des zones de montagne est inférieur à celui des populations urbaines ; le degré de formation scolaire est plus bas, l'échelle des valeurs sociales est différente. De ce fait, le désir des parents de voir leurs enfants entreprendre des études est d'autant plus faible qu'ils savent que ce choix constitue souvent le premier pas vers l'abandon définitif de la région. Toutefois on peut constater, dans les régions considérées, une augmentation de la demande d'enseignement qui mène aux études supérieures.

Conclusions

Jusqu'à présent, le développement économique des régions analysées s'est fait librement, sans planification d'ensemble des activités vers un objectif précis. L'existence dans ces régions d'industries utilisant des techniques de production ne demandant que peu de main-d'oeuvre qualifiée ou hautement qualifiée et la sous-représentation du secteur des services a contribué à accroître le déséquilibre inter-régional des niveaux de formation de la population.

L'école n'a pas su combler les lacunes socio-culturelles des régions de montagne, pour les raisons suivantes :

- L'autonomie communale dans le domaine de l'école primaire et enfantine a été dans certains cas un obstacle à l'amélioration de la qualité de l'enseignement. Les communes ont ressenti depuis de nombreuses années les effets des fortes variations démographiques : très forte augmentation des inscrits jusqu'aux environs de 1970 (due partiellement à l'immigration de travailleurs étrangers), puis brusque diminution dont les causes dépassent de loin le cadre régional.

  Puisque, dans le cadre restreint des communes considérées, la possibilité de planifier à moyen ou à long terme est très réduite, la plupart d'entre elles se sont opposées le plus longtemps possible à la nécessité d'augmenter le nombre des classes, espérant un renversement de la situation qui permettrait d'éviter un investissement et de lourdes charges supplémentaires.

  Beaucoup de communes ont toutefois été obligées de construire de nouveaux bâtiments scolaires et l'ont fait pour s'assurer suffisamment de places dans l'éventualité d'une poussée démographique ultérieure : au lieu de quoi, c'est une diminution de nombre d'élèves qui s'est produite.

  Cette diminution a d'ailleurs provoqué la fermeture de certaines écoles : 25 à 50 % des écoles situées dans les régions analysées regroupent plusieurs niveaux dans la même classe. Classes surchargées, classes trop peu nombreuses : dans l'un ou l'autre cas, la qualité de l'enseignement en souffre. Le renversement de la tendance démographique a pris les autorités communales au dépourvu et la situation actuelle montre la nécessité d'une coordination intercommunale.

  Par contre, pour les communes excentriques des régions considérées, le phénomène déterminant a été une diminution progressive de la population totale, et surtout de la population d'âge scolaire , d'où la création d'écoles intercommunales ou l'augmentation des classes à plusieurs niveaux.
- La politique cantonale en matière d'enseignement et de formation professionnelle a trop rarement tenu compte des besoins régionaux ou des problèmes spécifiques de certaines communes. Dans plusieurs cas, le principe d'une école avec le même programme pour tous, les enseignants formés de la même façon, la même base pédagogique a ignoré les différences de départ des élèves (exemples : peu d'encouragement de la part de la famille, moindre maîtrise du langage "scolaire" etc.). Ceci a paradoxalement favorisé les déséquilibres inter-régionaux.
- Le maintien d'une structure commune à plusieurs filières dans l'enseignement secondaire du premier cycle et le fait que le deuxième cycle a été moins décentralisé vers les régions de montagne.

- La faiblesse démographique des régions de montagne n'a pas justifié aux yeux des autorités scolaires cantonales la création d'établissements d'enseignement secondaire de deuxième cycle dans les régions de montagne.
- La réglementation fédérale en matière de formation professionnelle, et en particulier l'existence d'un grand nombre de spécialisations, empêche sa décentralisation dans les régions de montagne.

2. LE ROLE DE L'ENSEIGNEMENT DANS LA REALISATION DES OBJECTIFS FIXES DANS LE PROGRAMME GENERAL DE DEVELOPPEMENT DES REGIONS CONSIDEREES

De l'analyse des trois programmes de développement, il ressort clairement que l'enseignement a un rôle à jouer dans le développement régional. Il n'en est toutefois ni le seul facteur ni le principal : l'adéquation de l'enseignement aux objectifs de développement est cependant une condition importante.

Mais étant donné l'absence d'une politique globale de l'éducation et le fait que ce soit en général d'autres secteurs (emploi, infrastructure, etc.) qui sont au centre des préoccupations des personnes et des instances participant à l'élaboration des programmes de développement, il n'est pas étonnant que l'éducation y ait un rôle peu clair et qu'elle ne s'insère pas dans une stratégie d'ensemble visant, par exemple, à réaliser un équilibre entre les besoins de main d'oeuvre et de formation et l'égalité des chances.

L'absence d'une tradition de planification scolaire en Suisse fait que l'on ne s'est guère soucié d'équilibre. La situation économique favorable du pays et le recours à l'immigration n'ont jamais exigé d'analyse sérieuse des relations formation-emploi, revenu-formation, techniques de production-salaires-formation, etc. D'ailleurs les quelques propositions faites en ce domaine se sont généralement heurtées au problème de la pluralité des niveaux de compétence : communaux, cantonaux et fédéraux.

Lors de l'élaboration des programmes de développement, ces difficultés sont ressorties, mais grâce à la création de commissions de travail composées de représentants de tous les secteurs, y compris des responsables de l'école, et grâce à l'action de techniciens de valeur, une partie de ces difficultés a pu être surmontée.

Dans les quelques paragraphes qui suivent sont résumées les principales recommandations tirées des études de cas.

Propositions pour un meilleur équilibre entre formation et besoins en main-d'oeuvre

L'amélioration de la productivité du secteur agricole, l'importance d'une certaine polyvalence des agriculteurs, la nécessité de reconvertir une partie des agriculteurs dans d'autres métiers, exigent la création d'écoles, l'amélioration des programmes des écoles existantes, le développement de leur rôle d'animation.

L'enseignement pourra ainsi contribuer à créer une agriculture plus efficace, capable de mieux assurer des revenus comparables aux autres secteurs productifs.

Les modifications structurelles recherchées (changement dans l'importance relative des divers secteurs et branches d'activité économiques) et les modifications des techniques de production impliquent un rôle plus important de l'école dans la recherche de l'équilibre entre l'offre et la demande de main-d'oeuvre, tant au niveau de la formation initiale qu'à celui de la formation professionnelle des adultes (reconversion et perfectionnement).

Les trois régions misent beaucoup sur la création d'un tourisme rationnel qui contribue au développement régional en utilisant une main-d'oeuvre qualifiée. Ceci implique que soit développée dans la région même une formation hôtelière, commerciale et administrative, encouragée par une bonne information et par l'orientation professionnelle.

Les mesures visant à une meilleure adéquation entre la formation professionnelle et l'emploi devraient permettre à la fois d'améliorer la rentabilité des secteurs productifs, l'augmentation des revenus et la stabilisation de la population dans la région.

Propositions pour une meilleure adéquation entre l'enseignement et le contexte social régional

Les changements de structure du système scolaire

Dans les exemples que nous venons de considérer, les propositions ayant pour but d'innover dans les régions les structures du système scolaire ne sont pas nombreuses.

Ceci est dû en partie au fait que les centres de décision quant aux structures scolaires sont situés au niveau cantonal et, pour la formation professionnelle, au niveau fédéral.

La région valaisanne bénéficie, comme le reste du canton, d'une innovation, le "cycle d'orientation" ; la région "Tre Valli" innovera avec la "scuola media unica". Quant à la région "Uri" le problème d'éventuelles divergences entre régions et canton ne se pose pas, puisque les deux entités se confondent. (Bien que la proposition d'introduire le latin dans les écoles secondaires doive permettre aux élèves des zones marginales d'accéder plus tard au gymnase.)

Seule la région "Tre Valli" se propose de mettre sur pied un type d'école qui irait au-delà des structures scolaires cantonales existantes. En effet l'école secondaire "intégrée" du deuxième cycle, proposée dans le programme de développement de cette région, n'est pas encore une réalité cantonale.

C'est aussi dans cette région que la réglementation fédérale sur la formation professionnelle est ressentie comme la plus contraignante et, sous certains aspects, en contradiction avec le projet de développement régional. (Impossibilité, du fait des nombreuses formations prévues pour les différentes professions, de rassembler dans la région le nombre suffisant d'élèves pour justifier une école sur place.)

L'amélioration de la qualité de l'enseignement

Cette amélioration devrait se faire de deux façons apparemment contradictoires :

- permettre d'appliquer les méthodes pédagogiques modernes utilisées dans les centres : donc égalité des conditions d'enseignement ;
- considérer les zones de montagne comme défavorisées et fournir une aide supplémentaire par rapport aux autres zones : donc traitement différencié.

Des revendications analogues se retrouvent dans les trois études de cas. On met l'accent soit sur des améliorations para-scolaires : transports, horaires, bourses d'études, etc., soit sur la nécessité d'intégrer les programmes à la réalité locale, sur le besoin d'une formation spécifique des enseignants et, implicitement, d'une participation de la population à l'activité scolaire.

La réflexion sur l'enseignement primaire, sur le fond des problèmes posés par l'actuelle diminution de la natalité, est particulièrement nécessaire : écoles intercommunales à classes homogènes, où l'on applique un enseignement moderne, ou bien petite école de commune, avec des classes à plusieurs niveaux, mais proche de la réalité locale, où les parents des élèves peuvent suivre et participer à la vie scolaire? La question reste ouverte.

L'amélioration de la qualité de l'enseignement pourra contribuer à la réussite scolaire de certains groupes sociaux jusqu'ici défavorisés et permettra des choix professionnels plus réfléchis.

L'amélioration du cadre culturel régional

Le rôle que l'enseignement peut jouer dans le développement du contexte culturel régional peut avoir des effets contradictoires :

- d'un côté, le développement de l'infrastructure scolaire, la concentration de certaines formes d'enseignement dans des centres qui constitueraient des pôles de développement à la fois économiques et culturels dans la région sont indiscutablement positifs.
  La création d'une centre de documentation, revendiquée dans les objectifs de la région tessinoise, l'importance, soulignée dans le programme valaisan, que revêt la présence d'enseignants dans la région, témoignent du souci de garder et de développer l'école en tant que foyer culturel.
- de l'autre côté, le développement de la demande d'éducation, sans un effort parallèle pour créer des emplois attrayants dans la région, ne pourra que favoriser le départ des jeunes vers les villes et provoquer un appauvrissement culturel de la région.

Conclusions

L'analyse du rôle de l'enseignement dans le développement régional, tel qu'il ressort des trois études de cas, appelle quelques remarques :

- certains objectifs de l'enseignement sont directement reliés au développement économique régional ;
- d'autres, par contre, peuvent être partiellement en conflit avec les objectifs qui visent la diminution de l'émigration : nous nous référons aux objectifs qui ont trait à l'égalisation des chances ;
- l'infrastructure scolaire ne doit pas être considérée uniquement en fonction des besoins de l'enseignement, mais aussi du rôle culturel que les établissements scolaires peuvent jouer ;
- il faut enfin mentionner le fait qu'aucune région, y compris le canton-région d'Uri, ne peut se considérer autonome en matière de politique éducative. Le recours à une politique inter-régionale (ou intercantonale) est et sera donc inévitable.

3. CONCLUSIONS GENERALES

Les programmes de développement régional envisagent de stabiliser la population grâce à l'augmentation des revenus et à l'amélioration des conditions de vie dans la région ; un apport concret du secteur éducatif est donc indispensable.

L'amélioration des revenus ne peut se faire que par le remplacement de certaines activités par d'autres, plus rentables, et par l'adoption de techniques de production qui utilisent plus de main-d'oeuvre qualifiée. La loi fédérale sur l'aide aux investissements dans les régions de montagne, et d'autres lois fédérales et cantonales visant des objectifs analogues, assurent les prémices indispensables à la création d'activités rentables et compétitives. Ces interventions devraient déclencher un processus autonome de développement. L'école permettra ce démarrage en assurant une formation conforme aux nouveaux besoins, tout en répondant aux autres tâches qu'on lui attribue.

Mais les trois études de cas font ressortir aussi des considérations moins positives quant à la relation enseignement-développement.

- Le système d'enseignement présente souvent des structures relativement rigides, et la relation entre enseignement et développement social, économique ou même culturel n'est perçue que partiellement. De ce fait, les propositions novatrices sont souvent écartées.
- Bien qu'on recommande une meilleure adéquation entre programmes scolaires et réalité régionale, une plus grande souplesse dans le choix des filières, la création de nouvelles possibilités de formation, il y a peu de chances pour que ces objectifs puissent se réaliser simultanément.
- Le problème du temps nécessaire à l'adéquation du système scolaire aux nouvelles exigences du développement régional est rarement mentionné dans les programmes de développement. En outre, on n'a pas essayé de traduire en quantités mesurables les besoins en nouvelles activités économiques selon le type de formation. Le lien entre le monde de l'économie et celui de l'école repose probablement encore sur les postulats classiques d'équilibres automatiques.
- La complexité du processus de prise de décisions dans le domaine de l'enseignement ne peut qu'entretenir ces convictions.

Les trois autorités compétentes - communale, cantonale et fédérale - n'ont pratiquement aucune autonomie de décision sur un problème scolaire. Les compétences ne sont pas seulement réparties selon les divers niveaux d'enseignement, mais aussi selon les catégories d'interventions. Bien que l'enseignement primaire, par exemple, soit sous la responsabilité des communes, le contenu des programmes, la formation des maîtres, la réglementation concernant les constructions scolaires sont du ressort du canton. Aussi la plupart des recommandations faites dans les programmes régionaux devraient-elles s'adresser aux trois autorités simultanément, même si elles touchent des aspects différents du même problème.

La région peut-elle avoir suffisamment de force politique pour coordonner les intentions et les efforts des diverses autorités vers un même objectif? D'ailleurs, les buts que se proposent les diverses autorités peuvent être parfois contradictoires.

L'amélioration de la qualité de l'enseignement dans une région peut être en conflit avec une politique cantonale qui vise, par exemple, à diminuer les dépenses. Au niveau cantonal, le système d'enseignement est souvent analysé, corrigé, modifié dans une optique psychologique et pédagogique. Au niveau régional, par contre, l'analyse peut être faite plutôt du point de vue économique, et en ce qui concerne l'éducation, ce sont moins les problèmes pédagogiques que la relation formation-emploi dans la région qui sont au premier plan.

L'absence d'une analyse globale, au niveau fédéral et cantonal, rend difficile une évaluation sérieuse des diverses propositions régionales. Ceci est d'autant plus ressenti si, dans un canton, il existe plusieurs régions de montagne et si ces dernières présentent pour approbation leur programme de développement à des moments différents, comme c'est souvent le cas.

Grâce aux clauses de la loi fédérale sur l'aide aux zones de montagne, un nombre assez important de personnes prennent part aux discussions pour mettre sur pied les programmes de développement de la région et des efforts sont faits pour renseigner la population sur les diverses propositions. Cependant, même si une participation réelle des habitants est prévue, il reste encore beaucoup à faire pour permettre à la population et aux communes directement intéressées d'examiner de façon critique les programmes qui concernent le développement futur de leur région.

Nous terminons notre rapport par l'énumération de quelques problèmes qui devraient être approfondis pour mieux comprendre le rôle de l'enseignement dans le développement régional.

L'élaboration d'une méthodologie de base pourrait servir à toutes les régions qui doivent encore préparer leur programme de développement, aux cantons eux-mêmes, pour leur politique scolaire, et aux responsables fédéraux, comme base de réflexion, d'évaluation et de comparaison.

Questions sur la "réalité institutionnelle" des régions

- Les structures régionales sont nées de la nécessité de se "présenter" en tant qu'institution aux autorités fédérales afin d'en solliciter des crédits. L'élaboration du programme de développement a été le moyen de faire participer certaines catégories de la population des régions (autorités communales, personnalités locales, etc.). Mais il reste à déterminer exactement quelles seront les tâches que la région et ses organes pourront assumer à l'avenir (et quelles seront leurs compétences) afin que, une fois les crédits octroyés, les particularités communales ou sous-régionales ne puissent pas causer la désagrégation de la région.

- Dans le secteur scolaire (à part les régions-cantons), les régions n'ont pas de compétences spécifiques. Ces compétences sont localisées au niveau fédéral (peu), cantonal et communal. Or, les compétences que les régions peuvent obtenir sans trop de changements dans les législations qui les régissent, sont celles qui peuvent leur être déléguées par les communes. Il serait intéressant de faire une analyse de la répartition cantonale/communale des compétences pour les cantons où se constituent des "zones de montagne" ou au moins que des exemples soient examinés.
- La "réalité institutionnelle" des régions est, en général, encore à faire et ce même dans le secteur de l'éducation. Les commissions et les instances qui collaborent à l'élaboration des programmes de développement en sont l'embryon, mais il faut encore développer et étudier des modèles possibles de participation des autorités scolaires communales (commissions scolaires, par exemple), du corps enseignant, des représentants des parents ou des élèves, à la vie organique de la région.

Questions sur la "culture régionale"

- Un des facteurs présumés de la "réalité" de la région est l'existence d'une culture spécifique. Le cas échéant, en quoi consiste-t-elle?
- Si cette culture spécifiquement régionale existe, comment l'école peut-elle la prendre en considération? (Valorisation des traditions ou des initiatives d'innovation locales, éventuellement du dialecte, etc.).

Questions sur la contradiction entre l'égalité des chances et le maintien de la population régionale

- Le principe de l'égalité des chances impose que les jeunes des régions de montagne aient les mêmes possibilités que les autres de suivre les filières éducatives qui mènent aux études secondaires et supérieures. Mais les emplois où peuvent être exercées les qualifications ainsi acquises sont rares dans les régions de montagne : il s'ensuit que les jeunes ayant la meilleure formation émigrent. La contradiction semble insurmontable. Il y aurait donc lieu d'analyser de près la question suivante : dans quelle mesure les jeunes des régions de montagne, qui ont reçu une bonne formation, sont-ils revenus dans la région après un certain temps pour y mettre sur pied ou y développer des activités économiques intéressantes pour toute la région? Dans ce cas, la perte d'une partie de la population hautement qualifiée serait compensée par les nouvelles activités économiques qui découlent de ce phénomène.

- D'un autre côté, une partie de la population active très qualifiée réside dans la région tout en travaillant dans une autre. Dans quelle mesure la région est-elle, pour ces personnes, seulement une "zone dortoir" et dans quelle mesure ces personnes participent-elles aux activités socio-culturelles de la région?

Questions sur la concentration des institutions scolaires

Il est évident qu'avec le développement du principe d'un maître par matière à la place du maître unique, il faudra inéluctablement regrouper les élèves des écoles secondaires du premier cycle. Mais la discussion porte aussi, dans certaines des régions de montagne et en raison de leur faible densité de population, sur les classes primaires et préprimaires.

Il serait nécessaire d'examiner plus en profondeur les arguments principaux sur lesquels se basent les deux thèses en présence :

- Le regroupement des élèves dans des centres scolaires d'une taille adéquate est-il vraiment positif sur le plan pédagogique? Le passage de la structure pluriclasse à la structure monoclasse, par exemple, est-elle favorable "en général" ou seulement dans le cadre d'un certain type de pédagogie et de programme?
- La présence d'une école dans des zones excentriques est-elle vraiment un facteur d'animation socio-culturelle? En particulier, quel est le rôle de l'enseignant dans ces communautés?

Questions sur les relations inter-régionales

- La loi fédérale sur les zones de montagne a stimulé la création d'un nombre impressionnant de régions de ce type. Le propre de cette loi est d'octroyer des crédits à la condition qu'un programme de développement soit mis sur pied. Or, ces programmes sont élaborés de façon très autonome par les différentes régions. Ils sont ensuite présentés à des époques différentes à l'autorité fédérale responsable de l'octroi des crédits. Il en résulte que la coordination entre les différents programmes de développement est faible. Or, la plupart des secteurs sur lesquels les programmes veulent avoir une influence, et en particulier les secteurs économiques, n'ont pas d'autonomie au niveau régional. L'économie régionale s'insère dans celle du canton et dans celle du pays tout entier.

Certaines décisions prises au niveau d'une région ont une influence sur les régions voisines et ne peuvent se réaliser sans l'accord de celles-ci.

- Dans le secteur de l'enseignement, une certaine coordination des structures et des programmes scolaires est en train de s'instaurer entre plusieurs cantons dont font partie les régions de montagne.

Une question qui se pose est celle de déterminer le rôle éventuel des "régions de montagne" dans ce processus, de façon que la constitution de ce niveau intermédiaire entre canton et commune n'entrave pas les efforts intercantonaux de coordination.

Summary of Technical Report No. 4

THE ROLE OF EDUCATION IN THE DEVELOPMENT POLICY OF THE MOUNTAIN AREAS IN SWITZERLAND

by
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The authors begin by pointing out that post-war development in Switzerland contributed to a regional imbalance of population and economic activities. To counteract this imbalance, the Confederation has been promoting since the 1950s a regional policy to assist the mountain regions. Despite certain constitutional (Art.31) limits on Confederation intervention in cantonal affairs and the complexity of integrating federal, cantonal and communal measures, the new regional policy has progressively broken new ground. Its main features are:

- Regionalisation i.e. concerned with geographical rather than cantonal units.
- Comprehensiveness: concentrating not only on improving agricultural production in the mountain areas, but also endeavouring to provide other economic activities - a factor significant for educational planning.
- Economic efficacity: limiting itself to financing activities that are the most profitable in investment, revenue or employment returns.
- Concentration of investments in growth centres. In 1974, a federal law was passed permitting the Confederation to grant financial aid (up to 25 per cent) to public or private bodies for works improving the basic infrastructures of mountain regions. To qualify for such grants, a region must:
  - . Organise itself politically i.e. form a regional assembly drawn from the different communes in the region.
  - . Determine a programme of development for the region. This programme will have four objectives: demographic, production and employment, quality-of-life, and objectives concerning the power of attraction of the region.

These conditions being fulfilled, the improvement project must in addition have the approval of the regional assembly, the canton and the Confederation. Thus in addition to contributing to the socio-economic analysis of developing regions, liaison between the communes, the regions (50 have been already defined covering 75 per cent of Swiss territory), the cantons and the central government is also promoted.

THE SWISS EDUCATION SYSTEM

Before dealing with the role of education in regional development, it is well to outline the structure of Swiss education. In Switzerland, the federal goverment's constitutional and legal rights in matters of education are quite limited - especially at the primary and secondary levels - compared to those of the canton and commune. Only in higher education does the State create institutions or assume more than half the financial burden. Although the State legislates for all forms of vocational training, almost 80 per cent of the total costs in this sector are assumed by the cantons and communes. Again, the cantons are responsible for educational planning within the canton, a situation which, though having democratic merits, often leads to a seeming lack of integration of educational with social and economic planning. In recent years this situation has led to a call for intra- or supra-cantonal co-operation in educational matters, though as yet the contribution of education to regional development has not been fully appreciated.

THE ROLE OF EDUCATION IN THE DEVELOPMENT OF THE SWISS MOUNTAIN REGIONS

There follows in the Report three case studies of development projects in Swiss mountain regions presented essentially in the words of the different development agencies involved. Thus, each case study exhibits a different concept of regional development as well as a different appreciation of the role of education in this development. However, the authors of the report have given some uniformisation to the three case studies by grouping them under the following headings:

- character of the region;
- the educational amenities of the region;
- the educational demand in the region;
- the concept of development and education's role within it.

They also provide a consolidated description of the characteristics and findings of the case studies. The regions chosen are those of:

- Regione Tre Valli in the Canton of Tessin
- The region of "Viège-Ouest Rarogne" in the Canton of Valais
- The Canton of Uri (a canton-region).

CONSOLIDATED DESCRIPTION OF THE CASE STUDIES

Socio-economic activities. Although emigration from the regions in question is important, yet the population is increasing slightly due mainly to a relatively high birth rate. Thus the age pattern is characterised by comparatively more children and old people. So in some communes over half the budget has to be devoted towards the education of children. The agricultural sector, though diminishing, still remains fairly strong relative to the rest of Switzerland, and employs from 12 to 14 per cent of the labour force. Other sectors however are developing, such as the chemical industry in the Canton of Valais, the metal industry in Tessin, and tourism and building in general. In building and other labour-intensive industries, unskilled foreign workers are often employed, but there exists a general lack of employment opportunities for skilled workers - a situation which leads to commuting and finally emigration.

Education. Educational amenities are generally insufficient, distance from school and inadequate working conditions being two outstanding problems. In primary schools in many communes, there is not even one teacher per class. Grammar-type schools are found mainly in the town centres while vocational schools are more decentralised, but for both types of education - particularly at advanced level - more than half the pupils enrolled are obliged to leave their region. In addition, children from the mountain regions are under-represented numerically in secondary education and do not succeed as well as children from urban areas. It seems that the mountain or agricultural economy which demands few highly-specialised workers contributes, along with insufficient educational amenities, to an economic and cultural imbalance. The meagre resources of many mountain communes which prevent them from financing adequate school amenities and from planning an effective education policy point to the necessity of:

- intercommunal co-operation in the provision of educational amenities;
- more effective educational planning in the cantons taking into account regional and communal needs, in that a rigid policy of educational equality discriminates against the mountain regions;
- improving the federal prescriptions concerning vocational education which often do not take into account actual needs.

Education and achieving development objectives. The case studies show that education, while it is not the primary development factor, is an indispensable condition of development. Because of the lack of a tradition in Switzerland of overall educational planning, this essential role of education is not always clearly recognised. However, the case studies make certain proposals concerning education:

- proposals concerning better matching of education and manpower needs especially in the agricultural and tourist sectors in order to improve incomes in these sectors.
- proposals advocating better integration of education into the regional social context. These proposals concern principally (a) the reform of educational structures at regional level; (b) the improvement of the quality of teaching in schools dealing with children of underprivileged social groups; (c) better integration of the economic and educational/ cultural sectors.

CONCLUSIONS

Regional development in Switzerland looks toward stabilisation of regional populations by means of an increased income and the improvement of living conditions in the regions. This will take place only if more profitable economic activities or new methods of production are introduced. To accomplish such a change, a real contribution from the educational sector is necessary: education must help to communicate to the work-force the new attitudes and the new skills demanded by new methods and activities. It seems that this educational role is not yet fully appreciated in Switzerland. However, the authorities ought now to study especially the relationship between communal, regional, cantonal and federal objectives in education and to provide a basic blueprint of development methodology which would serve as a guide to all bodies responsible for regional development and educational planning.

Part Two

EDUCATION AND ITS ROLE IN REGIONAL DEVELOPMENT

Deuxième Partie

L'ENSEIGNEMENT ET SON ROLE DANS LE DEVELOPPEMENT REGIONAL

Technical Report No. 5

THE APPALACHIAN REGIONAL COMMISSION: DEVELOPING EDUCATION PROGRAMS FOCUSED ON ECONOMIC DEVELOPMENT AND REGIONALISM

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Franklin, the American patriot, speaking on the certainties of life, once remarked that "the only things that were certain in life are death and taxes". One additional certainty should be added: "change". In attempting to describe this complex education program, one must understand that the Appalachian Regional Commission's concept of regionalism is based on building organizational and programmatic approaches that are flexible in allowing our states and local communities to deal forcibly with the myriad of complex factors that change dramatically from day to day and year to year in education. It should be noted, and hopefully observed, that the ARC approach, while flexible, is based on responsibility. Sound planning and evaluation procedures and plans ensure a focus on problem-solving before moving on to other situations.

Education in the United States has been the responsibility of local and state government. The United States Constitution clearly identified the responsibility for education at the local level. Consequently, any Federal programs for education have focused on national emergencies such as the scientific and engineering education programs stimulated by Sputnik in the late 1950s and the equal-educational-opportunities program of the 1960s.

Various regional approches have dotted the education map of the United States. As early as 1787, the Northwest Ordnance set aside a certain amount of land for education. In addition, various agreements between states for teacher accreditation were reached, with some states choosing facilities close to their state boundaries to facilitate resource-sharing.

Thus, to understand the education program, one must realize that this was the first major approach to organize education services on both an economic and regional base. The sequence of those events that have led to a current broadly based education program follows.

I. MAKING UP THE DEFICITS IN EDUCATION: ACCOMPLISHMENTS 1964-74

Goals for the Decade

In 1964 the President's Appalachian Regional Commission (PARC) recognized that "Economic growth in the modern world depends to a large degree on educational excellence. Yet, the Commission pointed out, "the educational resources (of the Appalachian Region) are inadequate. It has not produced a sufficient corps of educated persons in the past - it lacks the tax base to provide an adequate education effort in the future."

In 1966, PARC carefully reviewed the large set of data that were either indicative or symptomatic of the Region's educational problems. High drop-out rates of students, high teacher turnover, and high rejection rates of Selective Service applicants were the most descriptive examples of the education system's deficits. In addition, the low tax base of the Region made the system's improvement difficult.

PARC concluded that ARC could make maximum impact with its limited education funds by investing in area-wide vocational education institutions. The immediate need was to train and retrain the Region's youth, 18-21 years of age, in job-saleable skills.

A corollary goal was the construction of additional higher education, library and educational television facilities so that the Region would have a facilities population ratio commensurate with the rest of the nation.

The PARC report and Congressional testimony also called on the Commission to monitor Federal programs and become the Region's advocate in assuring representative assistance within these programs.

The Appalachian Regional Development Act (Part B, Section 211) set these objectives:

> "a) In order to provide basic facilities to give the people of the Region the training and education they need to obtain employment...make grants for construction of the school facilities and for the equipment and operation of such facilities and other school facilities needed for the provision of vocational education in areas of the Region in which such education is not now adequately available...
>
> b) In order to assist in the expansion and improvement of educational opportunities and services for the people of the Region...make grants for planning, construction, equipping and operating vocational and technical educational projects, which will serve to demonstrate areawide educational planning, services and programs."

Thus, the initial education goals of the Commission in 1966 were clear:

- to build a region-wide system of "job-relevant" vocational technical schools;
- to increase the number of education facilities in the Region by supplementing other basic Federal facilities and equipment programs;

- to stimulate areawide educational planning, services and programs; and
- to act as an advocate and broker for the Region's needs and programs in the Federal education programs.

Summary of Accomplishments

Generally, the Appalachian Regional Commission has made a considerable contribution toward the improvement of education in the Region. ARC has attained these goals:

1. The Commission is making *significant progress in meeting its goal of enrolling 50 percent of all 11th and 12th graders in the Region in Appalachian-funded "job-relevant facilities"*. Current figures indicate that 47 percent of the Region's 11th and 12th graders are enrolled in ARC-assisted facilities.
2. Through its Vocational Education Program the Commission has *stimulated an additional investment of local, state and Federal funds for vocational education in the Region*. In Fiscal Year 1975, there was an increase in state and local contribution from 33.6 to 47.8 percent.
3. The Commission through its broker role has *significantly influenced the flow of additional Federal education support to the Region*. Between $15-20 million in additional Federal education programs have been brought into the Region by the Appalachian Program since 1969: over $4 million of Elementary and Secondary Title III grants; $3 million of Professional Development; $6 million vocational education; $1 million environmental education; $3 million from the National Institute of Education.
4. Through the use of Section 214 of the Act, three Appalachian states have *built and equipped or planned sophisticated communication systems*, such as educational television. These have been used to improve education in schools, in adult education and in public broadcasting.
5. The Commission achieved national recognition in designing, implementing and securing funding for an *experimental satellite education program*. The satellite program has provided graduate education training to teachers in reading and career education. Over 1,200 teachers have taken free video and audio-interactive courses. On January 1, 1977, ARC will expand this system to provide courses, training and information to adults, students and professionals in education, medicine, government services and business and industry. A $22 million intra-agency program will be implemented.

6. The establishment of multi-county service programs through Regional Education Service Agencies (RESAs) since 1970 has shown successfully that the administrative sharing of educational services is successful and economically feasible. (Seven states have enacted permanent legislation for RESAs; ARC has invested $5.3 million in RESAs which received in addition $10.1 million from state and local sources.) RESAs served over 4,363,000 children and employed 60,000 professionals. A recent study on the effectiveness of the RESA program stated "The RESA program has been successful in terms of its primary objectives of providing an institutional and administrative mechanism through which local school districts can combine resources to improve the quality and quantity of educational opportunities and services available to the Region's residents."
7. In 1971 the Commission took nationwide leadership in developing a career education priority. Over $5.5 million have been invested in career education. Presently, at least 53,000 students and 1,500 teachers are involved in ARC-funded programs.
8. Until 1969-70 a considerable investment in higher education facilities was made by using ARC Section 214 funds. Presently, there are more classroom space and facilities per student in Appalachia than in the nation as a whole. Fifty-one million dollars was expended; a recent study on ARC higher education indicates significant progress by Appalachian higher education institutions. Most colleges or universities are above the national medians on faculty salary, Student Aptitude Test scores, and capital expenditures.

II. UNDERSTANDING APPALACHIA AND ARC'S EDUCATION PROGRAM

The Appalachia of today is certainly not the Appalachia of two decades ago. As late as 1960, the situation in Appalachia was grim.

Thirty-three percent of the families living therein had annual incomes of less than $3,000 at a time when the national average for families in that income category was below 20 percent. Only 9 percent of all Appalachian families had incomes exceeding $10,000 at a time when the national average of persons with incomes in excess of

$10,000 was 15 percent. The 1960 per capita income in Appalachia was $1,400, while the national average was $1,900. Seven percent of the Appalachian work force was unemployed, as compared with a 5 percent national average. Only 32 percent of the population over 25 years of age had graduated from high school, compared with a national figure of 42 percent. These stark statistics were the dry and unemotional indicators of a regional anguish.

As mentioned earlier, the President's Appalachian Regional Commission (PARC) pointed out that "the primary drive for [economic] recovery must originate inside [Appalachia's] boundaries" and emphasized the importance of the "education gap" as a serious barrier to that drive.

Data examined by the Commission at that time provided strong indications that the educational deficiencies extended to all parts of the Region's education systems. However, the report explicitly anticipated passage of legislation then before Congress, including the Economic Opportunity Act and the Elementary and Secondary Education Act, and took account of the help which these acts were expected to bring to the development of human resources in depressed areas. Thus, to avoid possible duplication, the Commission recommended that supplementary resources be not initially focused on basic education, but rather on remedial literacy programs related to manpower training and on the creation of additional physical facilities for vocational and technical education.

Since that time, the situation has improved due to the changing economy and in some way to the efforts of the Appalachian Regional Commission.

Between 1965 and 1973, employment in the Region increased by more than one million jobs, slightly less than the national average employment rate increase. Between 1965 and 1973, per capita income in Appalachia rose approximately 89 percent to an all-time high of $4,110. The number of families classified as poverty-stricken declined by 2 million, although the 18 percent poverty level which existed in 1970 still exceeded the national average of 14 percent. Furthermore, by 1970, 44 percent of the population had graduated from high school, as compared with the national average of 52 percent, i.e., an improvement over previous periods. Thus, it is apparent that an auspicious upward economic trend had been established by 1972. The economic life style of the Region was moving away from the "margin" of American life and shifting toward its "center".

Indicative of the increased desirability of the Appalachian way of life is the Region's growth in population between 1960 and 1970 (500,000) and between 1970 and 1975 (840,000). The current population of the 13-state area is 19,027,000. This growth was partially due to:

- the return of recently discharged military service personnel;
- a substantial urban backlash, i.e. a rejection of urban living for the rural life style;
- an escalation of unemployment rates in metropolitan areas;
- the growth of employment opportunities in the Region;
- the increased availability of recreational and retirement housing within Appalachia; and
- the increased availability of direct and indirect transfer payment revenues, primarily in the form of Social Security and black-lung payments, to individual citizens.

This urban backlash is of particular significance. Americans, long steeped in the traditions of the simple, agrarian life based on an appreciation of and communion with nature, instinctively moved during the 1970s to embrace once again their historic antecedents. Frederick Jackson Turner's theory of population movement has reasserted itself here. Moving from urban areas toward the rural heartland, Americans were, in ever-increasing numbers, returning to the smaller communities that were havens of individualism and security.

Naturally enough, the newly-arriving - or re-arriving - inhabitants needed employment. The dramatic increase in the number of jobs reported above is indicative of a large-scale expansion in overall economic activity within the Region. Between 1965 and 1973, major industrial employment rose by 26 percent. While this statistic falls below the national average of 28 percent, it is significant that the industrial diversification developing within the Region portends a growth both in Appalachia's traditional industrial base and in a variety of new industrial activities. Of particular interest is the major growth achieved between 1965 and 1973 in manufacturing (248,700 new jobs); trade and industries (288,300 new jobs); and finance, service, insurance and real estate (309,500 new jobs).

ARC investments during the first decade of its existence have no doubt significantly assisted in the training and development of the manpower needed for this regional growth. Over 500 vocational/technical facilities have been built in Appalachia over the past 10 years. Nearly $273 million, though less than 1 percent of the Region's education expenditures, have made a clear impact on the Region's growth. Yet, even if the Commission had a substantially larger budget and could thus focus its investment strategy on direct support of conventional operating programs, such a strategy could not significantly reduce the remaining overall "education gap". Furthermore, the dissipation of Appalachian funds for the support of these programs would defeat the very purpose of the ARC education program, i.e. the creation of new and add-on services in order to stimulate regional development.

The figures reported above, though giving cause for considerable optimism, nevertheless reflect a series of needs currently facing the Region. These needs impact heavily on public and private institutions, and, to a substantial extent, prescribe the type of services required of the Appalachian Regional Commission during the upcoming decade. Clearly ARC must recognize and deal with the fact that, despite gains of significant proportions on a broad front, two decades later Appalachia is still faced with:

- an illiteracy rate among 24-to-40 year-olds approximately three times as high as that of the United States population;
- a substantial lack of career information or counselling for students in rural areas;
- the geographic inaccessibility or technical inapplicability of available education services;
- changing career trends, with an accompanying requirement for retraining adult manpower;
- the inadequacy of the manpower supply in health careers and child development work;
- declining reading achievement at the elementary and secondary level; and
- inadequate and inappropriate educational planning aimed primarily at wartime crisis solutions rather than at long-range community development.

These are disturbing shortcomings, to say the least, and it would be easy to capitalize upon them through the use of facile explanations and medicine-show nostrums, designed to provide a rapid bureaucratic cure for most Appalachian problems. To adopt such approach, however, would contribute to a cruel and totally unjustifiable deception. There are no easy solutions for Appalachia's ills. There are, however, some feasible approaches which will be adopted by Appalachian community leaders as a means of initiating programs designed, over time, to get at the roots of the various problems.

In order to plan for the current education program, a number of scholars, in cooperation with the staff of the Appalachian Regional Commission, fashioned some approaches designed to implement education programs in Appalachia. These recommended approaches are:

1. Creation of an open-ended, flexible system of education which allows for voluntary participation limited only by a participant's ability to profit from the instruction or educational experience selected.
2. Creation of a substantially integrated education system combining vocational education, liberal arts education, adult literacy programs, and adult basic education.

3. Integration of education and community services, such as consumerism, nutrition and health services.
4. Increased use of communications technology to bring educational resources to rural Appalachian campuses, and, in doing so, overcoming problems of inaccessibility.
5. Greater emphasis on career training rather than job training to enable trainees to shift with changing market requirements and preventing early obsolescence.
6. Establishment of a partnership between vocational education, higher education, and industry and labor to provide meaningful cooperative experiences.
7. Increase long-range educational planning efforts of an appropriate nature.
8. Attempt to respond to the felt needs of the populace rather than engaging in goal-prescription activities that may be self-defeating.
9. Assist the states to develop reading programs that will demonstrate effective approaches to improving the basic reading skills of the Region's population.

Although it is apparent that services of various kinds are currently being supplied to the Region by the Appalachian Regional Commission, two questions arise: Are the services being provided appropriate? And is ARC responsiveness sufficient to meet current regional requirements? Too often various government institutions have been guilty of "bandaid" or "tokenist" approaches to regional problems. The cycle normally involves the perception of a community need at the local/state level; a vigorous and sometimes frenetic movement to institute a programmatic response on a pilot ("crash") basis; gradual institutionalization or "folding in" of the program with a concomitant degradation of its community impact, and, finally, a return to business as usual.

In the light of the developments noted above, it seems legitimate to say that Appalachia is rapidly assuming an industrial and social position from which it will soon be able to increase its economical and planning approach to the nation. The availability of such leverage will trigger ever-increasing demands on education for modern intellectual, psychological and operational tools. If education lags behind - and many of the Region's institutions appear at present as though they will run the risk of becoming increasingly outdated and ineffective - they will find themselves continually playing intellectual and programmatic catch-up, following the lead of more dynamic institutions.

The time has long since passed when education institutions can dictate programmatic content to the communities it seeks to serve. As Willard Wirtz recently indicated in his study of work and America, "Education must be reintegrated with the community. Communities will allocate more of their available resources to the development of programs serving a shifting clientele - at present made up of more diverse and more adult persons. Vigorous program development in non-degree areas with more flexible scheduling and content areas is indicated. The education community must respond to the demands of local industry and government for specialized and, in some instances, presently nonexistent training programs. Education must enter a partnership with the community in the assessment of needs and must build a more flexible and more rapid organizational response capability." Implicit in the latter contention is the requirement for continually updating the collegiate system, described by Robert Hutchins as "a collection of autonomous units joined together by a unitary heating system". In summary, Appalachian professionals are presently getting in touch with their community.

The influx of new energy business and the dramatic development of the service sector will bring new opportunities and new people to Appalachia. Urban migrants, many of whom are middle-management professionals with excellent academic credentials, will cause a strain on the social and economic fabric of the Region. Many of these people are finding themselves in competition with members of the local population, and the latter group often finds itself at a substantial disadvantage. This clash of cultures can foster tragic social discontinuities if not addressed early by retraining local personnel to meet the newly developing competitive challenge of the market place. Additionally, urban migrants themselves require reorientation and retraining designed to fit them for their new life style. And finally, foreign investment will continue to grow in the Region. Consequently, local communities will have to adapt to representatives of diverse foreign cultures working and living in rural communities.

III. SPECIFIC ARC PROGRAMS FOR THE FUTURE

ARC's education program for the coming three years must take the above trends into account. Specifically, the Commission, in administering the program, will have to encourage a continuing shift in emphasis from the construction and equipment of facilities to the expansion of existent programs and the introduction of new ones so as to maximize facility utilization and make more productive use of available program monies. To this end, it will have to develop criteria derived from an ongoing facilities-utilization study that will make it incumbent upon project sponsors to document a clearly identified need, provide assurance of operation at full capacity until a specified target date, and demonstrate the non-feasibility of less costly alternatives (e.g. renovation, consolidation or expansion of existent facilities, provision of transportation, etc.). The Commission will also have to restrict equipment grants to those that will serve innovative or expansionary programs or will facilitate the replacement of equipment determined by vocational educators to be technologically obsolescent. Current priorities for operation projects - program expansion, career education, guidance and placement services, the provision of training in fields with critical manpower shortages, and the support of programs responding to priority needs (as identified by the states in the appropriate planning documents) - will have to continue receiving primary consideration. However, support for such programs will have to be restricted to five years to encourage an increasing commitment of non-Federal resources to productive programs, to effect termination of nonproductive ones, and to permit the states to reprogram Appalachian monies for meeting emerging needs in other functional or geographic areas.

The Commission's new program authority under Section 211(b) of the Appalachian Regional Development Act (ARDA) Amendments of 1975 is still keyed to the *demonstration* concept, which implies the support of *innovative*, *areawide* projects reflecting the priority areas mandated by Congress and suitable for replication elsewhere in the Region, subject only to legal, geographic, or state policy constraints. The demonstration character of this section and the non-replacement proviso in Section 214 of ARDA clearly mandate that the authority under Section 211(b) not be used for funding conventional programs that have been traditionally supported through the allocation of categorical Federal, state, and local resources.

Under the authority of Section 211(b), the Commission will support vocational and technical education projects in the following areas:

1. maximization of the use of existent vocational and technical education facilities;
2. career education programs for secondary and post-secondary students and adults;
3. pre-service and in-service training for teachers;
4. introduction of home-based multimedia individual study or self-paced centers;
5. guidance, counselling, and placement services;
6. financing of innovative facility and equipment projects;

7. cooperative education projects that enlist the support of business and industry;
8. recurrent education projects which provide for adult basic education and adult vocational upgrading or retraining; and
9. reading, mathematics, and other basic academic skill programs.

Traditional ARC support for Regional Education Service Agencies (RESAs) will also be provided under the authority of Section 211(b). RESAs will continue to serve their primary capacity of offering cost-effective areawide services in the areas of education and educational logistics (e.g. special education, gifted and talented programs, media repair, cooperative purchasing, etc.) that cannot be provided by local education agencies because of the lack of fiscal or manpower resources. It is also hoped that RESAs will perform a catalytic role in opening up the education system by promoting the interfacing of diverse educational institutions; encouraging community involvement to include both educators and non-educators (with the latter drawn from business, industry, labor, and public officialdom); and, cooperating with Local Development Districts (LDDs) in education planning and programming within the context of the Areawide Action Program. RESAs will also be encouraged to exploit the resources of the Appalachian Education Satellite Program (AESP) by offering multi-faceted education programs in all ARC-assisted functional areas so as to establish needs, suggest solutions to problems, and aid in the development of human resources.

The Commission will extend the implicit mandate under Section 211(b) to the funding of limited and clearly circumscribed types of project charting new approaches to education with a focus on economic development and exhibiting a potential for replication. Such projects must be identified in the Commission-approved State Appalachian Development Plan, must reflect major educational needs in the state's Appalachian Region, and must command a state commitment for continued ARC financial support linked to the successful attainment of initial project objectives. This support will give the state greater flexibility in meeting educational priority needs, yet, at the same time, impede the dissipation of scarce resources in response to pressures generated as the result of declining revenues in all areas of education.

The last-mentioned need deserves more discussion than can be accomplished in a short report. Over the past two decades, schools have been saddled with the responsibility of responding to a myriad of difficult societal problems. The inability of schools to fashion such responses has frequently led to fragmentation and to the alienation of schools from the communities they were meant to serve. New Federal policies and Federally-assisted programmatic efforts could lead to the creation of open-ended and diversified community programs that would evolve from a partnership of the school and the community. Other efforts could be directed toward the restructuring of vocational curricula that would enhance the employability and occupational upward-mobility of vocational graduates at all age levels. Such programs could be designed and monitored by community advisory councils having equal representation by educators, business and industry, and the community at large.

The most salient lesson learned from the Appalachian experience - that the community at the grass-roots level must be afforded an opportunity to assess its educational needs, fashion its own response, and, depending upon the magnitude of the needed effort, elicit the requisite assistance from various levels of government - suggests a major dictum: That education must no longer be an exclusive province of educational agencies, but receive input from a variety of individuals and institutions, with emphasis on governmental organizations that look to the education system for providing them and other key sectors of society with manpower and other resources. Such input is particularly vital in the light of an ever-changing economy, calling periodically for the development of new skills and the abandonment of old ones, and the mobility of the American family that, in recent history, has reversed the pattern of preceding years and emigrated from major metropolitan areas to small towns and rural communities, burdening the latter with a demand for new and expanded services. Obviously, an entrenched and inflexible education system cannot cope with such changes. New institutional mechanisms are needed to meet emerging needs, e.g., the regional education agencies sponsored by the Appalachian Regional Commission that have developed cost-effective specialized services that individual school systems in their multicounty service area could not afford. But regionalism cannot stop at subregional or state boundaries, but must transcend the latter where massive educational problems (e.g., adult functional illiteracy in Appalachia) call for a regionwide effort. By the same token, the Federal government must create more flexible mechanisms for providing effective support toward the solution of regional problems.

It is recognized that regional commissions do not provide a panacea for all organizational ills. They do, however, constitute an effective mechanism for regional program-project administration, since they are multidisciplinary by nature and are therefore capable of responding to a totality of needs that transcend the area of education. Translated into simple terms, this means that a regional commission could correlate, for instance, needs for educational, medical, social, and other services in a given community and respond with funding for an integrated, comprehensive facility rather than for individual functional facilities so as to meet those needs at a considerable saving to the taxpayer.

Appendix A

DESCRIPTION OF ARC EDUCATION PROGRAMS

I. DEMONSTRATION PROGRAMS

Demonstration programs and those conducted in the RESAs were somewhat varied and differed from location to location. In 1973, RESAs reported there were six media services programs. These included an instructional development institute, delivery of materials from a central library, and repair of audio-visual equipment. No comparison can be made as to the efficiency of operation before and after the service started, except in the equipment repair programs where there was a saving of 50 percent. Prior to the service the average cost of repair per item was $25.00; after the RESA program it was $12.30. There is no question but that the school children received an enriched program from the material's centers, for many teachers had equipment, films, tapes, and similar materials available for the first time. In 1974 there were only five media programs reported.

Another program that met an ARC goal was early childhood education. In both 1973 and 1974 eight separate programs were implemented in ARC-sponsored RESAs. In 1973 these programs served 3,018 children, employed 40 professionals and 95 paraprofessionals. In 1974 services were delivered to 4,888 children, and the programs employed 104 professionals and 182 paraprofessionals. Four programs used a model developed by the Appalachian Educational Laboratory (AEL), which includes televised lessons, a weekly home visitor and a weekly mobile classroom. Two were funded by the Office of Child Development (OCD) of HEW. One of the AEL models was funded through Title III, of the Elementary and Secondary Education Act (ESEA). The West Virginia program funded by ARC was so successful that the state developed a statewide program for five-year-olds at an annual state cost of over $3 million. Overall, the programs demonstrate a variety of ways to educate young children from using the traditional classroom to highly innovative home-based programs. Most demonstrations included supplying health and nutrition information to parents.

In 1973 only five RESAs had developed programs for children with special needs, including the mentally and physically handicapped, such as those with speech, vision, hearing or learning disabilities.

During 1973, 4,785 handicapped children were screened and/or diagnosed, and 73 classes were conducted. Eighty-nine teachers attended in-service courses for teachers of the handicapped, while 2,216 teachers were given assistance in regular classrooms. Psychological services were provided in two RESAs for 1,000 children.

In 1974 there were eleven special education programs. In the RESA programs 42,327 children were screened and/or diagnosed. This was an increase of 37,542 children from the previous year. Similarly, there were 271 classes conducted for special children, which represents an increase of 182 classes. In 1973 only 89 teachers attended in-service courses, while in 1974 this figure rose to 129. Also in 1974, 1,822 teachers were given assistance in regular classrooms, an increase of 606 classroom teachers. Psychological services were provided in two RESAs for over 4,500 children.

In 1973, eleven RESAs conducted *staff development activities* for 4,500 teachers, an increase of 11,213 over the previous year. A total of 110 separate courses were conducted.

Another program that attempted to implement ARC goals was *career education*. Twelve RESAs conducted career education demonstration programs in 1973. Over 17,000 pupils were directly involved, and many more were indirectly affected. All grade levels were represented; in addition, 338 teachers received specific instruction on the topic. Most RESAs developed their own material, while a few used state or commercial programs.

In 1974 only ten RESAs reported conducting career education programs; however, these programs directly involved 53,696 pupils. This represents an increase of over 36,000 additional students receiving career education services. There was a concomitant increase in the number of teachers who received specific instruction in career education, i.e., from 338 to 1,459.

In an attempt to meet the shortage of *vocational guidance counsellors*, ARC-supported RESAs became involved in a number of in-service education programs. A total of nine programs were started, and over 500 school personnel were given some form of counsellor training.

Four RESAs in 1973 and eleven in 1974 tried small cooperative programs in *group purchasing*. The savings realized in these pilot efforts ranged from a 7 to 50 percent reduction in small quantity purchase prices. Six RESAs combined some of their administrative chores by pooling resources to buy computer time, usually from a nearby university. The services included:

- Pupil registration
- Class scheduling
- Grading
- Research and evaluation
- Needs survey.

Nine RESAs were actively involved with over 20 Appalachian institutions of higher education in some form of cooperative programming. Those include the following:

- Veterans outreach
- Planning consultation
- Education media centers
- In-service training for:
  - superintendents
  - teachers
  - special education teachers
  - paraprofessionals
- Counsellor placement
- Telecommunications.

In 1973 four RESAs were involved in providing adult education services to approximately 1,300 adults. Most of this effort was devoted to preparing adults for General Education Development tests. In 1974 five RESAs had adult education courses, serving about 3,500 adults. Of this, 1,988 adults were prepared for GED tests; of these a full 58 percent or 1,162 adults received their high school equivalency.

In 1974 the seventeen responding RESAs identified 32 new career programs they would provide in 1975. These programs include:

- Business machine repair service
- Satellite in-service education
- Experimental special education services
- Driver education
- Elementary and Secondary Education Act Gifted Children Program
- Heavy equipment training
- Evaluation or Title I program
- Reading programs
- Music education
- Gerontology
- Nutrition for aged
- Health education
- Regional computerized food service
- Handicapped early childhood education
- Adult right to read.

In implementing these new programs RESAs will reach an additional 161,000 students and adults in the Region.

Three RESAs reported an expected reduction in programs for 1975.

With regard to legislation, six states have developed legislation, three with ARC involvement. Three states submitted legislation with ARC staff involvement. One state has a comparable program (Georgia) developed by a department of government. Two states do not expect to ask for legislation. One may request it in the future.

II. EMPHASIS ON VOCATIONAL EDUCATION

a) Operating vocational education schools

The need to accommodate the rapid increase in vocational education enrollment, plus the impact of a 40 percent decrease in basic Federal funds and the recent sharp escalation in teacher salaries, has placed a severe strain on vocational education operating funds in the Appalachian Region. In recognition of these facts, Congress amended the Appalachian Regional Development Act in 1971 so that Section 211 funds could be used to support operating programs.

The Commission has adopted priorities for operating grants that include: more efficient use of facilities through double-shift and adult use; career education and career orientation programs; guidance and placement services; training in fields of critical manpower shortages; and transportation services for isolated rural students.

Through FY 1973 approximately $4.9 million in Section 211 funds were approved for 52 annual operating grants. Approximately half of the $4.9 million was obligated in the first priority area (additional vocational and technical education programs at the Appalachian-assisted facilities). Operating grants were approved in all of the other priority areas listed above. Of this amount about $2.5 million was utilized in 1973 for 18 operating projects, including continuation of 12 projects initially funded in FY 1972.

Operating grants included assistance to an interesting experiment in an Erie, Pa. vocational school. To obtain maximum use of this school, the administration brought in an additional complete faculty (except coaches) and held two complete sessions in the same building.

The first session is Monday, Tuesday, Wednesday; the second session is Thursday, Friday, and Saturday. Each student goes to school eight hours a day (compared with the previous six) with a shorter summer vacation (one month instead of three). Previously the facility offered 14 programs for 1,150 students. The new arrangement will add 15 programs and 900 students to the same facility. ARC provided a grant of about $243,000 for an expanded program of nearly $2.3 million.

The increase in operational programs will be more than offset by an expected decrease in construction and equipment projects. The following table (I-G) shows the projected funding levels by type of vocational education project for FY 1973 and FY 1974.

Table I-G

(thousands of dollars)

Type of Use	1973 Actual	1974 Estimate
Construction and Equipment	$21,862	$20,011
Operations	$ 2,482	$ 3,000
Special Demonstrations and Administrative Costs	1,665	2,000
Total Obligations	$26,009	$25,011
Less Prior Year Balances	- 520	- 11
Balances Carred Forward	+ 11	+ 0
Appropriation	$25,500	$25,000

The construction and operating grants are exactly the same kind of grants made available under the Vocational Education Act of 1963, as amended. During FY 1973, ARC funds were utilized in construction, equipment, operating and demonstration projects for vocational education totaling $66.9 million in total project costs. Of this, as shown below, $32.6 million or 49 percent from ARC funds of which the bulk was from Section 211. It is estimated that, when completed, the 59 facilities approved in FY 1973 will provide enrollment capacity for approximately 23,000 students.

Table I-H below depicts the sources of funding in vocational education for FY 1972 and FY 1973. As one can note, there is a large increase in state and local participation (from 33.6 to 47.8 percent) that more than offsets the decrease in the use of Education Vocation Act Funds (11.1 to 3.4 percent) and smaller decreases in Appalachian programs (55.3 to 48.8 percent).

Table I-H

(millions of dollars)

Source of Funds	FY 1972		FY 1973	
	Amount	Percent	Amount	Percent
Office of Education Vocational Act Funds	$ 8.2	11.1	$ 3.4	3.4
Appalachian Regional Program:	40.7	55.3	32.6	48.8
Section 211 Grants	31.8	43.2	26.0	38.9
Section 214 Supplements	8.9	12.1	6.6	9.9
State and Local Funds	24.7	33.6	32.0	47.8
TOTAL	$73.6	100.0	$66.9	100.0

Clearly the above demonstrates the continuing high interest in vocational education in the Region. A greater portion of secondary school students in Appalachia participate in vocational education than in the nation as a whole. The Commission has begun to develop a new profile of manpower skills in Appalachia through heavy investments in vocational and technical education.

b) Vocational education demonstration projects

In the 1971 Amendments to the Appalachian Regional Development Act, the Congress authorized the Commission to approve grants for "planning, construction, equipping, and operating vocational and technical education projects, which will serve to demonstrate areawide educational planning, services and programs". The general purpose of the demonstrations was to make education and training more relevant to assist Appalachians in choosing occupations and employment, and to help them gain access to the field of their choice. Particular emphasis was to be placed on programs that would provide services to the rural population by conducting programs involving two or more school jurisdictions. Demonstrations of the new approach to vocational education now being implemented by the U.S. Office of Education was also conducted in rural settings. This approach divides all vocations into 15 "clusters" of related occupations.

The Commission adopted priorities for demonstration projects that included more effective ways to utilize fully vocational and technical education facilities; career education and adult in-service professional development; home-based, multi-media individual study programs; innovative approaches to guidance and placement; and new facility and equipment projects, such as mobile classrooms or mobile guidance facilities.

As an incentive to the Appalachian states to conduct demonstration projects, $1 million was approved for matching funds to be utilized by the states in demonstration projects in both FY 1972 and FY 1973. About $3.5 million of Section 211 funds were obligated through FY 1973 for 40 innovative areawide vocational education demonstration projects. Most of the demonstration grants were for projects in the priority area of career education. In FY 1973, $1.7 million was approved for 20 demonstration projects, including continuation of 11 projects funded in FY 1972.

ARC has provided assistance to develop career education programs in at least 38 local education agencies in Appalachian Alabama. Career education is designed to make what happens in the classroom more meaningful to the individual student by relating it to the world and to the way in which he will earn his living. It helps the elementary student develop awareness of himself and of work, provides work experiences for junior high students and teaches senior high students the knowledge and special skills needed to become employed or to pursue further education after high school.

The Alabama program, which is being administered by the vocational division of the state Department of Education, is developing comprehensive demonstrations of this educational program. The results of these demonstrations are being used in developing career education programs for the entire state. For FY 1972, ARC provided $261,125 of the total cost of $350,000 for the first year. The project was funded for another year in FY 1973. ARC provided $238,568 and Part D funds of $53,570 brought the total cost of the grant to $292,318.

c) Evaluation of vocational education

The Commission approved a study to measure the impact of ARC-funded vocational education facilities in 25 selected areas of the Region and to assist in determining education and manpower needs for the program design study. A cross section of Appalachian vocational institutions were examined in the process.

In addition to the study, other evaluative efforts have been undertaken. Generally, most vocational schools report excellent results in the job placement of students. A special five-year follow-up study of graduates of Asheville-Buncombe Technical Institute in Asheville, N.C., completed in the fall of 1972, reported that 92 percent of the Institute's graduates of the previous five years were employed in the field of their preparations. A full 80 percent stated that the degree or diploma earned at the institute was necessary or helpful in obtaining and keeping their positions.

The graduates indicated that they did not have to enter other on-the-job training programs. Seventy-six percent said that the training received at Asheville Tech was adequate for their employment position. Seven percent of the graduates transferred to another institution, one percent graduated from a four-year college; however, 11 percent returned to Asheville Tech for additional training.

The Appalachian Commission has begun to influence curricula so that they are better tailored to existing and future job opportunities. It is assisting in the construction of new facilities, offering such courses as drafting, welding, cosmetology, data processing, advertising, child care, aircraft maintenance, highway engineering assistance, merchandising, marketing, chemical technology, horticulture and mining. In all, there are nearly 100 different courses in schools funded under the Act, according to figures supplied by the states. Only 6.4 percent of the students enrolled in Appalachian program schools are in agriculture courses; 9.1 percent in home economics; 17.3 percent in office education courses; 6.8 percent in technical education; 53.2 percent in trades and industry; 3.8 percent in health occupations; and 3.4 percent in distributive education courses. In submitting an application for Appalachian assistance on a vocational education project each state is required to demonstrate that course offerings will relate to job opportunities in the locality and surrounding areas. In addition, where the application is for an equipment, construction or an operation grant to provide for a course from which more than one class has been graduated, the project application must relate such course offerings to placement experiences of graduates who took such courses.

III. TELECOMMUNICATIONS

In addition to the above accomplishments the Commission has invested nearly a million dollars on the development of programs for educational and public television. The Kentucky Education Television System has developed an imaginative and productive extension series that provides adults an opportunity to pass a high school equivalency test. Virginia and Tennessee have funded imaginative, locally-based public broadcasting programs.

The Commission is currently managing a satellite-beamed two-way-instruction television program for 1,200 teachers in 10 Appalachian states. The potential for using high-beamed satellites to provide specialized services and instruction to sparsely populated wide geographic areas is promising. The Commission was also instrumental in obtaining $2.2 million from other Federal agencies to fund this project.

Appendix B

ILLITERACY RATES

Table 1

PERCENTAGE OF PERSONS 25 YEARS OLD AND OVER WHO HAVE COMPLETED LESS THAN FIVE YEARS OF SCHOOL - 1970

	(%)
Northern Appalachia	4.3
Southern Appalachia	10.0
Central Appalachia	15.3
Total U.S. (less Appalachia)	5.3

Source: U.S. census, 1970.

Table 2

ILLITERACY: PERCENTAGE OF SELECTIVE SERVICE DRAFTERS FAILING PREINDUCTION OR INDUCTION MENTAL TESTS BY STATE

State	1967	1968	1972
Pennsylvania	5.5	6.8	3.7
Ohio	8.1	7.4	4.2
Maryland	11.7	10.7	4.8
West Virginia	13.5	13.2	9.4
New York	13.7	10.0	5.3
Tennessee	14.0	12.9	13.5
Kentucky	14.2	15.9	10.0
Georgia	15.8	24.6	19.8
Virginia	16.1	16.5	11.5
Alabama	21.6	23.8	18.3
South Carolina	21.8	27.7	25.5
North Carolina	22.7	22.4	15.2
Mississippi	28.0	33.3	26.6
Appalachian Average	16.9	17.6	12.9
U.S. Average	11.3	11.8	6.7
Variation between U.S. and Appalachia	5.6	5.8	6.2

Résumé du rapport technique n° 5

LA COMMISSION REGIONALE DES APPALACHES : LES PROGRAMMES DE DEVELOPPEMENT DE L'ENSEIGNEMENT EN VUE DU DEVELOPPEMENT ECONOMIQUE REGIONAL

par
Harold E. Morse

La Commission présidentielle pour la région des Appalaches groupe treize états de l'Est des Etats-Unis, caractérisés par un développement inférieur et un chômage supérieur à la moyenne du pays. En 1964, cette Commission affirma l'importance de l'enseignement dans le développement économique et, constatant les lacunes régionales à cet égard, décida une action pour y remédier, conformément à la compétence générale que la Constitution fédérale attribue en ce domaine aux états et aux pouvoirs locaux.

ACTION DE LA COMMISSION

On peut, semble-t-il, distinguer deux étapes de cette action.

a) Première étape

Une analyse approfondie de la situation aboutit en 1966 à établir un diagnostic qui reconnait que la sous-éducation de la région à tous les niveaux est imputable à divers facteurs tels que l'importance des taux d'abandon précoce des études, la forte mobilité des enseignants, le caractère étroit de la sélection dans les enseignements supérieurs.

En raison de la limitation des ressources, due aux faibles recettes fiscales, la Commission décida de développer en priorité les programmes de formation à finalité professionnelle plutôt que l'enseignement de base, avec l'objectif bien défini de doter la main-d'oeuvre et, en particulier, les jeunes, de qualifications utilisables.

Cette politique visait à la fois à réduire le retard de la région et à répondre aux possibilités d'emploi découlant d'une attraction accrue de la région qui, depuis 1960 au moins, connaissait un accroissement démographique, dû à un important mouvement de migration des villes vers les campagnes, à l'existence d'un chômage urbain et à une législation sociale améliorée.

La politique de la Commission semble avoir largement répondu à ses objectifs et le bilan de la période 1965-73 se solde par un accroissement de l'emploi presque équivalent à l'accroissement national, une hausse de 89 % du revenu par habitant, et une légère diminution de la pauvreté.

b) Deuxième étape

A partir de 1973, la diminution des ressources, due essentiellement à la restriction massive des subventions fédérales et à la hausse des salaires des enseignants, a conduit la Commission à faire obstacle aux pressions d'intérêts en fixant des priorités assez strictes, mettant davantage encore l'accent sur la finalité professionnelle de l'enseignement replacé dans le contexte de la communauté régionale.

Considérant que, après une vingtaine d'années, les écoles n'avaient pas réussi à répondre à de nombreux et difficiles problèmes sociaux, la Commission envisagea de nouvelles approches diversifiées d'éducation en vue de satisfaire aux besoins du développement régional. Devant les nouvelles possibilités d'emploi dérivées de la demande de biens et de services, il convenait d'assurer aux scolarisés de tous niveaux une chance de trouver un emploi, à la fois en donnant aux habitants de la région des qualifications équivalentes à celles des migrants d'origine urbaine plus qualifiés et en préparant ceux-ci ainsi que les cadres étrangers, à leur nouveau style de vie. Par ces approches nouvelles, l'éducation ne doit plus être le domaine réservé d'institutions scolaires, mais relever d'une variété d'institutions et d'individus venant de tous les milieux intéressés.

Dans cette seconde étape, les priorités concernent l'analphabétisme, qui reste trois fois supérieur à la moyenne nationale, les lacunes de l'information et de l'orientation, les besoins de recyclage professionnel, l'insuffisance de la planification de l'éducation et de personnel qualifié dans des secteurs déterminés, tels les professions relatives à la santé et au développement de l'enfant. Ces priorités ont donné lieu à divers programmes spécifiques, parmi lesquels on peut citer plusieurs programmes utilisant des moyens audiovisuels et un programme de réparation de ces équipements, des programmes d'éducation de la prime enfance (télévision, classe mobile, etc.), des programmes pour les handicapés, de perfectionnement des cadres, d'orientation professionnelle, d'éducation des adultes, d'éducation des consommateurs. Les programmes sont gérés par des Agences régionales, dont plusieurs ont bénéficié d'une législation permanente de certains états.

INNOVATIONS EN MATIERE D'EDUCATION

Les nouvelles approches éducatives se rapportent aux aspects institutionnels, didactiques, à la participation, à la finalité de la formation, à son contenu. Ainsi, on peut citer :

- les formules d'éducation intégrée (générale et professionnelle, enfants et adultes) afin de permettre à une demande diversifiée de profiter des structures disponibles ;
- la coordination des responsabilités institutionnelles et socio-économiques (écoles professionnelles, université, industrie, monde du travail) ;
- la prise en compte des besoins et des motivations réelles de la population et de l'économie régionales, excluant toute uniformité prescriptive, et un effort de planification à long terme ;
- l'accent mis sur l'instruction sociale et civique (par exemple, éducation du consommateur) ;
- l'accent mis sur la préparation à la vie active (career education), allant au-delà de la formation technique à des emplois spécifiques ;
- la mise en place d'un réseau de liaisons, de communication et d'information (media, programme par satellite, transports, encouragement à la participation volontaire) ;
- les actions de formation et d'adaptation des enseignants, et les efforts pour faire participer des non-enseignants aux programmes de formation ;
- l'utilisation permanente des équipements, par rotation de l'occupation des locaux scolaires.

RESULTATS

Les résultats obtenus par la Commission paraissent, dans l'ensemble, très positifs. Ainsi, 47 % des élèves des 11e et 12e années profitent des facilités offertes par les programmes (l'objectif étant 50 %). Les états et les autorités locales ont consenti un important investissement additionnel pour l'enseignement professionnel. Les écoles professionnelles ont pu ainsi remplir la mission qui leur était impartie. Elles ont joué un rôle excellent dans le placement de leurs diplômés. Ainsi une enquête longitudinale de cinq ans, menée à l'automne 1972 dans un institut technique, montre que 92 % de ses diplômés avaient un emploi correspondant à leur préparation, que 80 % jugeaient leur diplôme nécessaire ou utile pour l'exercice de leur profession, que 76 % jugeaient leur formation scolaire adéquate, et que 11 % seulement avaient besoin d'une formation complémentaire.

Technical Report No. 6

REGIONAL POLICIES AND EDUCATION PLANNING AND PROVISION IN THE UNITED KINGDOM

THE EXAMPLE OF COVENTRY AND THE WEST MIDLANDS

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The United Kingdom has a system of regional policy-making and regional planning which is well established and as comprehensive as any Member country. There is similarly a complex and sophisticated education system which provides for compulsory schooling between the ages of 5 and 16 years, and for a wide range of academic, technical and vocational courses thereafter. But although employment and manpower problems have long been a feature of the country's economic difficulties, attempts to incorporate considerations of educational planning and provision into programmes of regional development are of recent origin. This report examines links between regional development policies and education in three sections with respect to the three major policy-making levels: inter-regional, intra-regional and local. Examples, where appropriate, are drawn from the West Midlands Economic Planning Region and since it is maintained that the educational response to needs for employment and training is essentially local, the City of Coventry has been selected for detailed consideration. Reasons for the low educational content of most, if not all, regional policy statements are discussed in the final section.

Regional problems have been a major concern to United Kingdom governments since the 1930s. Severe unemployment and slow economic growth in the North, Wales, Scotland and Northern Ireland, compared with expansion and relative prosperity in the South-East and Midlands were a notable feature of the inter-war economy. These differences were analysed by the Royal Commission on the Distribution of the Industrial Population ("The Barlow Report") in 1940, which concluded that the main causes were structural, that is, related to the mix of fast and slow growing industries present in a region.(1) Thus the South-East and the Midlands were characterised by a large number of growth industries, whereas the remaining regions had an excess share of older declining industries. It was on the basis of this report that the present system of regional planning in the United Kingdom was established, with the aim of promoting a programme of balanced development between and within the regions. Regional development policies were applied at three major levels; the inter-regional, the intra-regional and the local levels.

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1) The Royal Commission on the Distribution of the Industrial Population. (The Barlow Report) Cmnd. 6153. 1940.

I. THE INTER-REGIONAL LEVEL

Inter-regional planning is primarily concerned with the centrally directed allocation of resources between aggregate regions to achieve certain regional and national objectives. The promotion of a more equitable distribution of social and economic opportunities among regions has traditionally been pursued through a system of incentives designed to persuade industry and workers to locate in the depressed areas, and a set of deterrents to prevent them moving elsewhere. Today, this "carrot and stick" approach is operated by the Department of Industry, which offers a wide range of financial and fiscal benefits to enhance the attractiveness of the development areas as they are now termed. At the same time the Department of Environment operates stringent planning restrictions on industrial and office development in the other areas. Provision is made in this policy for the training of workers in the development areas in those skills which will be required by industry. Indeed, the creation of a pool of qualified labour is seen as a further way of attracting industry into the area. Where an employer provides training for workers to fill new jobs, the Department of Employment may pay his weekly grants over an approved period. There are similar schemes providing grants for training apprentices and technicians, the purchase of machinery and equipment needed for additional "off the job" training, and assistance in the training of older workers. Two specific schemes are designed to enable trained and experienced workers to make the best use of their skills. Relocation grants are available through the Key Workers Scheme for the transfer of essential personnel to install plant and machinery and to train local employees to form the nucleus of a new labour force. Grants are also provided in the Resettlement Transfer Scheme for workers living in assisted areas who have had to move to use their skills. Many of the industrial retraining programmes are carried out in Government Training Centres which are sited in most assisted areas and have no connection with the education service.

The organisation of education within the United Kingdom is the responsibility of the Department of Education and Science and with the notable exception of the University sector it is administered by Local Education Authorities which are a part of the framework of Local Government comprising County or Metropolitan Authorities. As with economic planning, Central Government lays down broad policies and offers advice in the interpretation of Parliamentary plans for education expressed through Acts of Parliament or decisions of the

Department of Education and Science. The Secretary of State can influence organisation across the field of education, in particular through his powers in respect of approving major building projects and in respect of the standards for school premises. However, a considerable degree of freedom is exercised by Local Authorities in educational planning. They are therefore able to respond to the differing and changing educational needs of the local community and its industrial structure.

The provision of post-school education outside the Universities began during the nineteenth century, partly under the aegis of voluntary bodies and those Local Authorities who chose to provide it. The 1944 Education Act imposed a duty upon Local Authorities to provide further education and this led to an increase in its provision. Ten years later there were 34,000 full-time students in the public sector of further education in the United Kingdom, whose number rapidly increased until in 1974/75 there were 210,230 full-time students.(1) Perhaps the most striking figures are those for part-time students. In 1974/75 there were 727,000 part-time day students; 785,000 students attending evening courses and a further 1,841,000 enrolments in evening institutes which provide a range of recreational and cultural classes. In fact, although the number of part-time students is large, with the exception of those attending evening institutes, their numbers have remained fairly constant over the last two decades.(2)

As the number of students and range of courses has grown during the last thirty years, so further education has been organised into a number of levels of activity. There have been many movements of colleges between levels according to their changing patterns of work. In 1956, the four-tier system of colleges of advanced technology, regional colleges, area colleges and local colleges was established. Subsequently, this pattern has been modified. In 1965, the colleges of advanced technology became the technological universities and so left the local authority sector. A year later, the White Paper "A Plan for Polytechnics and Other Colleges", led to the development of 30 Polytechnics; as a matter of national policy, advanced courses which tend to draw upon a supra-regional market are being concentrated in these centres.(3) More recently the Department of Education and Science, which is responsible for the planning of the provision of teachers, instigated the closure and amalgamation of a number of teacher training colleges consequent upon a need to reduce

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1) Department of Education and Science Report on Education No. 90, Department of Education and Science, May 1977.

2) Statistics of Education, Vol.3, Further Education, Department of Education and Science, 1975.

3) A Plan for Polytechnics and Other Colleges. Cmnd. 3006. 1966.

the supply of new teachers, because of the smaller forecast school population. In some areas, this gave rise to a new form of institution, the Institute of Higher Education which includes teacher training, together with a range of degree and sub-degree level courses. The finances for running all of these Local Education Authority Institutions are found in part from local rates (property tax), from Central Government grants, and from fees. Whilst the Local Authority controls the total expenditure of these institutions, it is normal practice for the governing body of a College to have some freedom in the detailed allocation of resources.

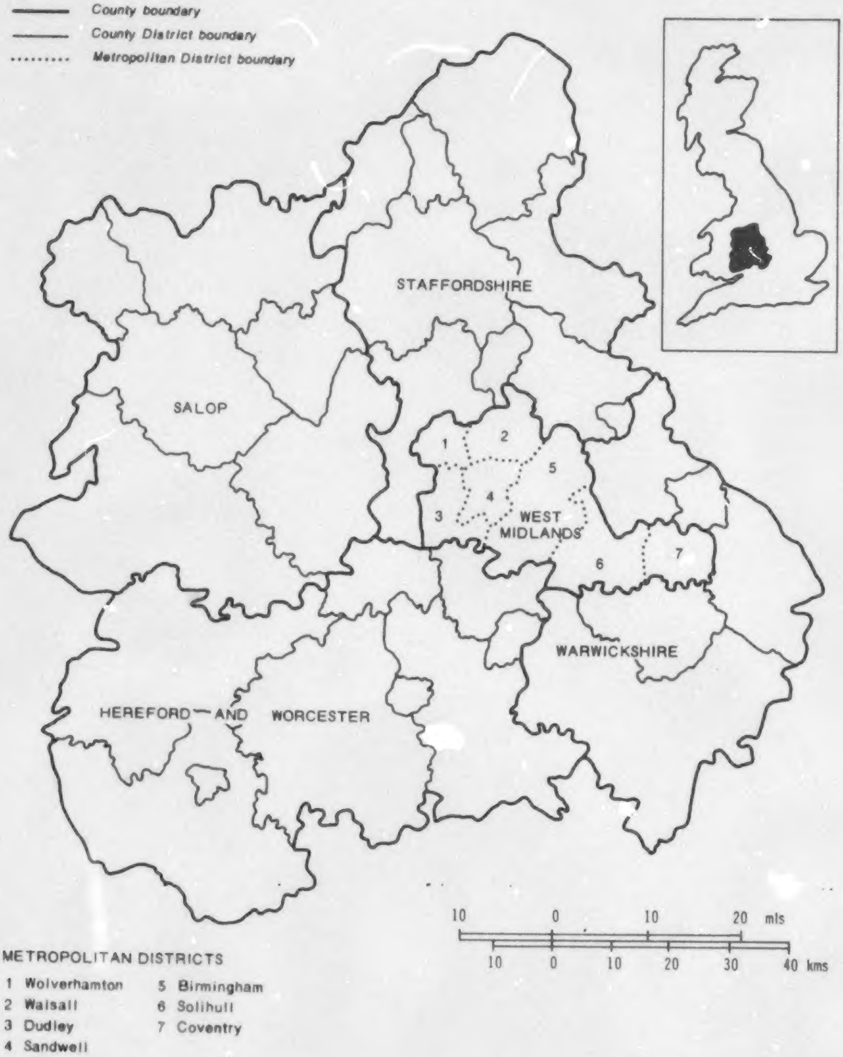
II. THE INTRA-REGIONAL LEVEL

The main concern for planning at this level is the pattern of social and economic activities within a region. Since 1965, the formulation of intra-regional development policies has been the responsibility of Regional Economic Planning Councils, which consist of representatives of different groups in each region (industrialists, trade unionists, traders, academics, etc.). They are assisted in this role by the Regional Economic Planning Boards, which are made up of civil servants seconded by their London departments. For purposes of intra-regional planning, Great Britain is divided into ten planning regions. These regions are examples of what geographers would term programming regions in that they are scheduled for policy-making purposes: they do not necessarily have any internal physical or economic unity.

An example of a planning region is the West Midlands (Fig. 1). In 1976, it had a population of 5.178 million and an area of 13,013 sq.kms. The region is dominated in population terms by Birmingham (population 1971: 1,014,670), the second largest city in the United Kingdom, but its spatial influence is limited by an encircling ring of smaller employment centres. Taking the definition of a functional urban area as a city together with its dependent commuting zone, the region can be broken down into 9 major labour markets; these are in decreasing order of size: Birmingham, Coventry, Stoke, Worcester, Shrewsbury, Hereford, and Stafford, Burton, Kidderminster.

It is important to note that the West Midlands is second only to the South-East, in terms of post-war economic growth and as such, is one of the expanding areas in the United Kingdom economy. For this reason, none of the development incentives described in the

Figure 1 **WEST MIDLANDS ECONOMIC PLANNING REGION**



County boundary
County District boundary
Metropolitan District boundary
STAFFORDSHIRE
SALOP
WEST MIDLANDS
1
2
3
4
5
6
7
WARWICKSHIRE
HEREFORD AND WORCESTER
10 0 10 20 mls
10 0 10 20 30 40 kms
METROPOLITAN DISTRICTS
1 Wolverhamton
2 Walsall
3 Dudley
4 Sandwell
5 Birmingham
6 Solihull
7 Coventry

previous section apply to the region. A particular feature of the economic structure of the West Midlands is the concentration of 'growth industries' in metals, vehicle manufacture, machine tool, mechanical and electrical engineering, and the expansion of these activities largely accounts for the addition of 416,000 people to the region during the 1961-71 inter-censal period. Most of this employment, however, is in the production rather than in the control side of these industries, the West Midlands being primarily a manufacturing area, although office employment has increased significantly since 1966. In broad terms, this means that the region requires educational institutions able to equip the workforce with the specialist manufacturing skills needed by these industries, while a further requirement will be for more training in administration and management as more industry becomes controlled from within the area. In 1975, there were 2,955 schools in the West Midlands, of which 514 were at secondary level attended by a school population of 1,001,249 pupils. Facilities for post-school education consisted of 4 Universities, 4 Polytechnics, 60 Colleges and 650 evening institutes.

Regional Development Strategies

An important responsibility of the Regional Economic Planning Councils since 1969 has been the production of Strategic Plans. The Regional Strategies as their name implies, are not firm blueprints for action, but they provide broad guidelines for the more detailed work of the Local Authorities. They set down the preferred long-term (20/30 year) pattern of economic, physical and social development in each region, based upon an assessment of its current attributes and future potentials.

It is implicit in the concept of Regional Strategies that they should integrate the major economic sectors such as industry and employment, with supporting systems such as education. In practice, however, while the necessity to develop education to provide for the needs of industry is acknowledged in all four regional strategies so far produced (for the South-East, West Midlands, North West, and East Anglia) the mechanism whereby this might be achieved is lacking. Despite the expenditure of large resources on these plans and the fact that this is the most appropriate scale at which to consider the provision of post-school vocational education, the education content of the Regional Strategies is negligible.

The absence of any consideration in detail of the educational provision is evident in the strategy for the West Midlands, the West Midlands Regional Study, published in 1971. The Study examines the long-term prospects for the region to the end of the century with a hard look at 1981, to evaluate proposals for the action that would be required to meet the demands of the present and to trace guidelines for the decisions on investment that would have to be taken in the future. The final report focused in detail upon population, housing, employment and industry, but education and training was discussed in a single paragraph. The main conclusion was that

> "... the loss of blue collar jobs in an area that has become a pool of skills and experience will entail a change in education over the long term, and will involve an increasing degree of occupational mobility. The growth not only of the service sector but of the economy as a whole might be retarded if sufficient and suitably trained labour for the changing employment structure were not available at the time when it is needed".(1).

The Regional Administration of Education

The low education content of regional plans may reflect the lack of educational planning at this scale, since there is no educational equivalent of the economic planning regions. Thus any educational response to regional development policies must be implemented by the individual education authorities of which there are 11 in the West Midlands, or by individual colleges controlled by them. This does not mean that there are no conscious attempts to administer education at the regional level, but since these take place outside the context of regional planning, they do not necessarily have any regard to these regional policies to which they must be linked if education is to play a full role in the process of regional economic development. The co-ordination of further and higher education at the regional level is vested in the Regional Advisory Councils (RACs) of which there are 10 in England and Wales and by the Regional Staff Inspectorate. Their roles should therefore be considered in more detail.

The RACs are essentially local bodies, being made up of representatives from industry, the trade unions, local authorities, universities, polytechnics and other further education institutions within the region. In their composition they are remarkably similar to the Regional Economic Planning Councils. They were established in 1947/48, "... to advise LEAs on and to co-ordinate the provision of non-advanced and advanced further education within their areas".(2). However, unlike the Regional Economic Planning Councils, they do not have a planning function for education within the region, their role is to control development rather than to promote it. The Regional Staff Inspectors also take an overview of further education within their region and are especially concerned that there is not over-

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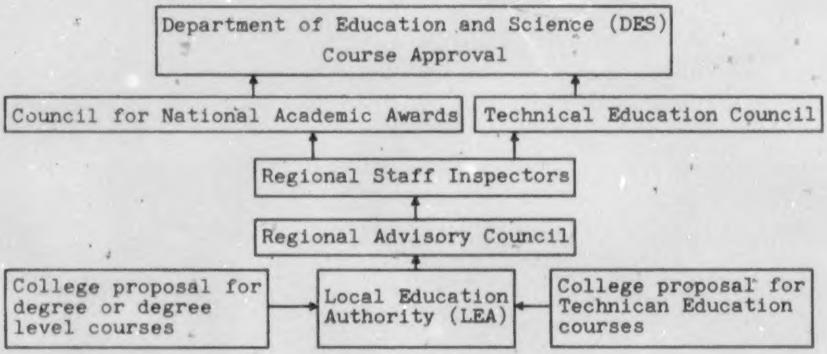
1) A Developing Strategy for the West Midlands: Report of the West Midlands Regional Study: 1971.

2) Op.cit.ref 2.

provision of courses and that there are sufficient resources of staff, accommodation and finance to operate them successfully. Both bodies are a part of the procedure through which courses are approved. The provision of programmes of study at various levels does take account of the needs of local industry, outside the purlieu of the Regional Economic Planning Councils. It is therefore appropriate to consider the mechanisms by which Education Authorities and their colleges plan the provision of post-school courses.

Education planning within a region is the charge of the Local Authority, whose aim is to respond to the educational needs of the area they serve. This role is emphasised by the structure of Local Government in which Local Authorities which include elected representatives, are responsible to the local population. Furthermore, the governing bodies of all colleges include representation from the local community, including industry and commerce, the trade unions and nominees of the Councils. The response of education to local employment needs is largely expressed in the vocational courses which predominate in further education and to some extent in higher education. Colleges enjoy considerable freedom in respect of the courses they may propose, although they are subject to a variety of controls in relation to the content and structure of their proposals. Thus any advanced course lasting for more than four weeks has to be approved by the Secretary of State through the Regional Staff Inspectorate. The diagram below summarises the methods of approval for programmes of study validated by external bodies with reference to two of them.

METHODS OF APPROVAL FOR EXTERNALLY VALIDATED
FURTHER AND HIGHER EDUCATION COURSES


Department of Education and Science (DES)
Course Approval
Council for National Academic Awards
Technical Education Council
Regional Staff Inspectors
Regional Advisory Council
College proposal for degree or degree level courses
Local Education Authority (LEA)
College proposal for Technican Education courses

The external validating bodies (of which only two have been mentioned although there are a whole range of professional institutions for whose membership students may be prepared) overlap to some extent with the Regional bodies in their responsibilities. They are also concerned with other criteria, principal amongst which is the standard to be attained by students gaining a particular qualification and with the detailed programmes of study proposed. Whilst these agencies are concerned with the local demand for a particular course, this is not their primary function. Other courses, not subject to external validation have still to be approved by the Local Education Authority, the Regional Advisory Council and the Regional Staff Inspectorate. Thus, whilst colleges have a degree of freedom in proposing courses, there are stringent procedures designed to ensure their viability in relation to both recruitment and educational criteria.

The number and variety of colleges has generated a wide range of educational programmes from the post-graduate level at one extreme to others in basic numeracy and literacy developed in association with the Training Services Agency, a part of the Manpower Services Commission which is currently concerned with a programme of opportunities for unemployed young people. Consequently some colleges draw upon a much wider area than the local region and must therefore be seen in relation to national as well as regional employment demands. On the other hand there are a whole range of courses which have been developed to serve the needs of the local community and in some cases to fit the requirements of particular employers. Thus, although there is no formal procedure for post-school education to meet the broad aims of the Regional Economic Planning Councils, by seeking to satisfy the need for vocational education within their areas, Local Authorities are generally fulfilling these objectives.

The provision of vocational courses for young people aged 16 years and over is extremely varied at sub-degree level. They can be simply divided into full-time and part-time programmes. Technical Colleges are mostly career orientated and their courses lead to Ordinary National Diplomas, pre-apprenticeship, pre-diploma studies, qualifications approved by the Technican Education Council and in the future the Business Education Council, etc. The OND normally requires four General Certificate of Education passes or their equivalent for entry and consists of two years of study, the aim of which is to provide a knowledge of the basic principles associated with an area of industry or commerce, such as building, engineering, hotel and catering or textiles. Pre-apprenticeship and pre-diploma courses cater for the vocational needs of students with more limited qualifications. Technician and Business Education Council programmes are being developed following the report of the Haselgrove Committee and are a means of standardising courses for technicians and those employed in commerce, for example, banking, insurance and management.(1)

Part-time study has been a constant feature of the technical colleges and is a way in which they can respond directly to the needs of local employees. Part-time day release students are employed by firms who release them for one or two days a week, during which time they pursue a course of study related to their full-time employment. An alternative pattern is termed block-release in which students are released from employment for periods of about 4 months, to follow a vocational course. Technical Colleges also provide 'link' courses in which students from the sixth forms of local schools can study for part of their time at the college where they might take a vocational programme involving, for example, pre-nursing or pre-secretarial training. More recently and in response to the problems of the unemployed school leaver, programmes of retraining and short vocational courses have been developed in association with the Manpower Services Commission. This account is by no means exhaustive but a clearer understanding of the way Further Education works with local industry and attempts to meet the needs of the community will be gained through an examination of the Coventry region.

III. THE LOCAL LEVEL

The most detailed policies for economic and social development in the United Kingdom are formulated at the local authority level. The local authorities are the basic units of local government and are responsible for administering a wide range of environmental and personal services. The present authorities are the product of a major reform of local government in 1974 which created a two-tier system of county and district authorities, and recognised two different types of area, metropolitan and non-metropolitan. Education and planning (with the exception of development control and the sale and acquisition of land) are both administered by County Authorities in non-metropolitan areas but they are split between county and district councils in metropolitan areas. Thus in the West Midlands Economic Planning Region (Figure 1), Warwickshire, Hereford and Worcester, Staffordshire, and Salop County Councils are responsible

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1) Report of the Committee on Technician Courses and Examinations, Development of Education and Science, 1969.

for both education and planning. However, in the West Midlands Metropolitan County, the County Council is responsible for planning, but the Metropolitan District Councils of Walsall, Wolverhampton, Dudley, Sandwell, Solihull, Birmingham, and Coventry are responsible for education.

A feature of the legislation in 1947 which followed the Barlow Report was that local planning authorities were charged with the responsibility of drawing up, and quinquenially revising a development plan for their area based on a survey and analysis; the plan to consist of a written statement and maps to show all important developments and intended changes in the use of land over a twenty-year future period. This plan was to be submitted to the Minister for approval and thereafter the local authority was to administer development control in accordance with the plan. As development plans were essentially concerned with additions to the built environment, their education content was negligible and typically consisted of the scheduling of land for school and college use.

Local Development Policies

Since 1968, however, structure planning has replaced development planning at the local level. Structure Plans are the local equivalent of the strategic plans prepared at the regional level. They have the overall aim of 'formulating the local planning authority's policy and general proposals in respect of the development and other use of land in the area'.(1) In this respect there is a clear similarity with development plans in that the primary focus is upon the physical pattern of change. The term 'structure', however, includes the social and economic as well as the physical systems of an area insofar as they are subject to planning control and influence. The structure is in effect the planning framework for an area and includes such matters as the distribution of population, the activities and relationship between them, the pattern of land-use and the development the activities give rise to, together with the network of communications and systems of utility services. Thus while the Written Statements which accompany structure plans are biased towards those aspects of development which are subject to control through town planning regulations, they include policies and general proposals for each of the local authority's areas of responsibility. In this way, broad considerations of education are to be found alongside considerations of housing, transport, employment, etc. in structure plans.

The task of linking these systems within an overall policy framework is ultimately the responsibility of management. An

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1) Section 7(3), Part II, Town and Country Planning Act, 1971.

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important trend in local authority administration in recent years has been the emergence of corporate management systems designed to facilitate the taking of broad perspectives and comprehensive overviews of the complete sphere of the local authority's responsibilities. The advantages are obvious in that it leads to more effective linking of the various areas of local authority responsibility and policy. This, for example, may lead to the joint planning, financing and use of premises for education, social service provision, and recreation, by several departments. Such linkages between policy areas are normally identified through corporate planning surveys which are initiated by the corporate management team. These surveys cover a wider range of matters than those which are relevant to the structure plans prepared under Town Planning legislation. The corporate survey reports are an integral part of the corporate planning process from which comprehensive statements of policy emerge.

Local Authorities are therefore responsible for preparing both structure and detailed expenditure plans for their areas. These plans are designed to review all the areas of local authority responsibility, the former being, however, restricted to those areas which are "subject to planning control and influence", and to set out a ten-year programme for development. It is through this planmaking process that education is incorporated within regional development policies at the local level.

This general outline of the place of education in local development policies can be usefully elaborated by reference to the Metropolitan District of Coventry. Coventry is a particularly useful case study on account of its extremely rapid post-war development which has imposed severe pressures upon all the major social, economic and environmental systems controlled by the local authority, including education. In fact, Coventry has been one of the fastest growing cities in the United Kingdom during the last thirty years, the population increasing from 265,765 in 1951 to 316,629 in 1961 and to 335,238 in 1971.

Coventry's post-war expansion, like that of the West Midlands, is based upon 'growth' industries in the manufacturing sector: 63 per cent of employment in the City is in manufacturing compared to 34 per cent in Great Britain as a whole. Within the manufacturing sector there is a pronounced concentration of employment in four main industries: motor vehicles; aircraft; mechanical; and electrical engineering; and these accounted for 53 per cent of employment in the City in 1971. Other major industrial specialisms include telecommunications equipment, man-made fibres and machine tools and the general engineering function is supported by a large number of component manufacturing firms in the city.

Education at the local level: the example of Coventry

Coventry's local education authority is responsible for the provision of nursery, primary, secondary and further education in the District. It has a duty to provide places in primary and secondary schools for all children between the ages of five and sixteen and in addition it has the power to provide nursery education for children under five. In September 1977, there will be about 5,600 children in school below the age of compulsory education, 32,100 in primary, and 28,900 in secondary schools.

Whilst the Authority has a duty to provide education beyond compulsory school age, participation in it is voluntary. The term 'further education' covers a diverse group of services which meet many needs and overlap at many points with other services provided by the local authority and with the activities of voluntary bodies. There is a multiplicity of organisational patterns and modes of attendance in further education. There are six colleges in the city each to a greater or lesser extent serving a purpose different from its fellows. Two of the colleges are primarily institutions of higher education and as such must be seen as much in a national as in a local context. These are, Lanchester Polytechnic where the majority of courses and degree level are undertaken on a full-time or sandwich basis, and the Coventry College of Education which provides education and training for teachers. Hereward College of Further Education for the Physically Handicapped is a unique institution, being the first attempt in the public sector to provide specifically for the educational needs of disabled people above school age; as such it too looks to a national catchment area for its students. Finally in this group are the three Colleges of Further Education providing a range of courses below the level of higher education for the most part. These courses vary in their content and aims. Some serve industrial needs and are intended for adults already in employment, others serve as alternatives to school courses for students of 16 or over, but the majority are more vocationally oriented either in preparation for work or in improving the skills of those already employed. Non-vocational courses, serving the general cultural and educational needs of the community comprise another group. Each of these colleges draws some students from beyond the City limits but the Coventry Technical College has the status of an area college and as such is a recognised centre for certain types of work in the sub-region.

Higher education in Coventry is also provided by the University of Warwick which was established in 1964 and currently has a student population of 5,000. Although located within Coventry, the University is an autonomous institution which is not subject to the control of the Local Authority.

Under the 1944 Education Act, local authorities have wide powers to determine the nature of provision for schooling for 5 to 16 year-olds in its area, but in practice there are many similarities between Authorities in the ways in which they discharge their responsibilities under the Act. A major factor in this respect is the operation of a national system of examinations for 16-18 year-olds, administered by examination boards, towards which most school work must relate.

The nature of policy issues facing the authority in the higher and further education fields are however different for it is through its provision of education at this level that the authority can most influence the nature and quality of the local labour force and hence the attractiveness of the area to industry. In formulating their development plan for the next ten years, Coventry District Council undertook a comprehensive survey of their objectives with respect to each of their major areas of responsibility. The 1973 Corporate Planning Survey consisted of eight volumes dealing with Education, Community Health and Well-being, Public Protection, The Promotion of Commercial and Industrial Development, Transportation, Leisure Opportunities, The Provision of Housing, Accommodation, and the Provision of a Satisfactory Physical Environment. The Local Policy Plan, and the Structure Plan which is part of it, sets out the policy of Coventry District Council with respect to education. Much of the policy is of course concerned with detailed local issues such as the siting and development of individual colleges; but the plans contain clear statements of educational policy which relate to similar statements for industry, housing and finance, in the form of a broad strategy for the development of the region. Thus the authority

> "... will continue to mount industrial training courses to meet the needs of local firms and it is expected that greater provision will be needed for in-service and retraining courses to meet a rapidly evolving technology. Link courses will be provided for young people in the upper years of secondary schools and steps will be taken to ensure that there is no unnecessary overlap between the schools and the colleges..."(1)

Important problems in local authority planning are the assumptions upon which such plans are based. In education this is especially difficult due to the nature of the constituent variables, principally births;

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1) City of Coventry Structure Plan, 1973: Written Statement, Coventry City Council, 1973.

> "The projection of births and of the future school population is a hazardous and complex business; it relies on several factors which are themselves difficult to predict, and which must be kept under regular reviews."(1)

During recent years these pitfalls for educational planning have been demonstrated in the trend to a smaller school population as a consequence of a fall in the birth rate, which was not foreseen in 1972. In that year DES projections foresaw a continuing increase in the numbers of children in school, but only two years later these estimates were revised. Thus, even in the Statutory Sector of education there are real difficulties in planning for a future demand over five-year periods or more. If one considers the problems of planning further education, which is not compulsory, the difficulties are compounded, since short-term fluctuations in the local economy and variations in student choice add to the problems associated with the birth rate. In Coventry the impact of the fall in the birth rate upon further education is yet to come and projections of student numbers look to an increase in demand during the next ten years.

It has been established that little attempt is made in the United Kingdom to link education planning with economic planning at the regional level except in very broad terms. The development of a corporate approach to local authority services has meant that education has become involved to a limited extent in the planning process at the local level. The response of the education system in Coventry to the employment needs of the Coventry District have been considerable, however, chiefly through the provision of vocational courses.

Higher Education

The training and subsequent employment of teachers is almost wholly within the control of the education sector, which might be thought to facilitate the planning of its provision. However, the City of Coventry College of Education in common with other Training Colleges does not only train teachers for employment in the City's schools. At present its courses are amongst the most vocational provided by the local authority. There are three main types of courses; a four-year programme leading to a Bachelor of Education Degree, a three-year Certificate course and a one-year Diploma in Education for graduates. The college draws upon a national market for its students, but the nature of the courses, which include periods of teaching practice in schools in Coventry and adjoining local authorities often leads to students finding employment locally

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1) DES Report on Education. No. 85. Department of Education and Science, June 1976.

through the links they establish with a school. Of the students who qualified in 1976, 29 per cent found employment in schools within the West Midlands Region. Of these, 52 per cent came to work in Coventry, 27 per cent in Warwickshire, 10 per cent in Birmingham, and 5 per cent in Solihull. The training of teachers is subject to DES constraints upon student numbers related to the variations in the national school population. The downturn in the school population has led the Department to close some colleges and to greatly reduce the numbers of teachers in training in others. Thus Coventry College of Education at its maximum development consisted of 1,350 students, this number will be reduced to about 700 by 1981. There is currently some debate as to whether the narrow vocational base of teacher training should continue and whether or not training colleges should prepare students primarily for teaching but broaden their courses to allow students a wider career choice; a debate which has largely developed in response to the greatly reduced employment opportunities for teachers.

Apart from teacher training, other higher level courses in Coventry are taught at Lanchester Polytechnic. In contrast to the Universities the polytechnics are a new kind of institution being little more than a decade old. Their role was explicitly defined in the White Paper of 1966 entitled "A Plan for Polytechnics and Other Colleges" in which the government indicated that the polytechnics, as comprehensive academic communities, would be expected to concentrate on and cater wholly or largely for students of 18 or over pursuing courses of sub-degree, degree, or post-graduate level.(1) The polytechnics were envisaged as having close and more direct links than the universities with industry, business and the professions. This intention was reaffirmed in the 1972 White Paper, "Education: A Framework for Expansion", in which the polytechnics were recognised as providing the main meeting ground between the world of higher education and industry and as having a vital contribution to make in ensuring that the country has a workforce capable of meeting the changing needs of business and commerce.(2)

Despite the clear intention in this policy to link higher education in the polytechnic sector to the general needs of economic development, the pattern of student demand in higher education, and in particular, the continuing popularity of many arts, social science, and 'pure' science subjects, has resulted in the polytechnics offering a wide range of both vocational and non-vocational courses on a full-time, sandwich, and part-time basis. Indeed, most of the current expansion in enrolment is taking place in traditional non-

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1) Op.cit. ref.4.
2) Education, A Framework for Expansion. Cmnd. 5174. 1972.

vocational areas rather than those linked to industry. Although the Lanchester Polytechnic is controlled jointly by Coventry and Warwickshire Local Education Authorities, recruitment to full-time and sandwich courses is mostly national and so these types of course are attuned to national needs: the Polytechnic's reputation for many of its full and sandwich courses in engineering, applied science, and management is, however, a reflection of its long-established and highly profitable links with local industry. As part-time courses draw students from a more limited catchment, it is here that the Polytechnic's response to local needs is most clearly evident. In 1976/77, 1,482 of the Polytechnic's 5,350 students were enrolled on part-time courses and these were mostly of a vocational nature serving local industry and commerce. Thus, for example, the Faculty of Engineering offered part-time courses in electrical and electronic, civil, mechanical, production, and control engineering, and in building, water pollution control, highway and traffic engineering, and turbine technology. Similarly, part-time courses in the Faculty of Applied Science include applied physics, mathematics, statistics, computing, physiotherapy, medical laboratory subjects, and metallurgy. The control and direction side of business and commerce is comprehensively served by part-time courses in business, accounting, management and law, while some of the more general needs of the area are met by courses in languages, planning, industrial design and health visiting. The Polytechnic makes a more direct contribution to local industry through its Industrial Liaison Bureau which arranges for individual members of staff to make their expertise available to firms on a consultancy basis. The Polytechnic may also undertake, from time to time, larger research projects for local industries.

Further Education

It has already been suggested that a large part of the liaison between industry in Coventry and educational provision takes place in conjunction with the three technical colleges. The provision of vocational education for local industry pre-dates the establishment of the local authority. In 1883 a petition signed by 300 Coventry working men was presented to the Mayor. This read

> "We the undersigned citizens of Coventry, feeling the great want of means of obtaining technical instruction in our various trades, pray you to call a public meeting to hasten on the movement that, we believe, is being made for establishing technical schools in the city."(1)

This was in many ways a reflection of the concern felt by the already skilled workforce of a city with an established tradition of

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1) R.A. Arculus, Life Begins at Forty: A Look at the History of Coventry Technical College, Coventry City Council, 1975.

craft industry based on textiles, watchmaking and subsequently cycles, which were to form the basis for the development of engineering, particularly in relation to motor vehicles, so important today. The Technical Institute opened in 1888 and from its inception it was closely linked to local industry. Indeed it was said that

> "Local industry was, however, often responsible for supplying major equipment, often free of charge, and this probably made possible engineering courses that would otherwise have been under-equipped or non-existent. The American Writing Machine Co. even loaned typewriters to the Commercial Department until 1893."(1)

In 1926 the Institute became a Technical College, thereafter continual expansion (Fig.2) resulted in the establishment of Lanchester College of Technology in 1960 (later to become Lanchester Polytechnic), to cover for higher level work and Henley and Tile Hill Colleges in 1964 and 1969 respectively. These new Technical Colleges "taking over the teaching of preliminary grades of engineering and secretarial courses and each with its own major specialism, Henley's being catering and Tile Hill, motor vehicle engineering".(2)

The tradition of strong ties with Coventry's industry, evident in the nineteenth century is very much a feature of the work of the further education colleges today. Many informal links with industry are maintained by members of staff with particular industrial and commercial enterprises. There are in addition a number of ways in which these are formalised. Course organisers are constantly liaising with the Training Officers of companies, monitoring the progress of students on day and block release from their firms. This ongoing dialogue results in a constant review of a course and the possibility of its being refined to meet particular industrial requirements. In addition each College department has established one or more Advisory Boards which include representatives from the areas of industry in the City relevant to the work of the department. These Boards meet at least three times a year and constitute a forum for evaluating courses and for proposing new ones. In most areas this liaison is a relatively easy matter since Coventry's industrial structure is dominated by a small number of large enterprises. However, in the service industries there are often a large number of small employers, and planning for their needs in respect of vocational training is more difficult. Within Further Education three major areas of vocational provision may be identified:

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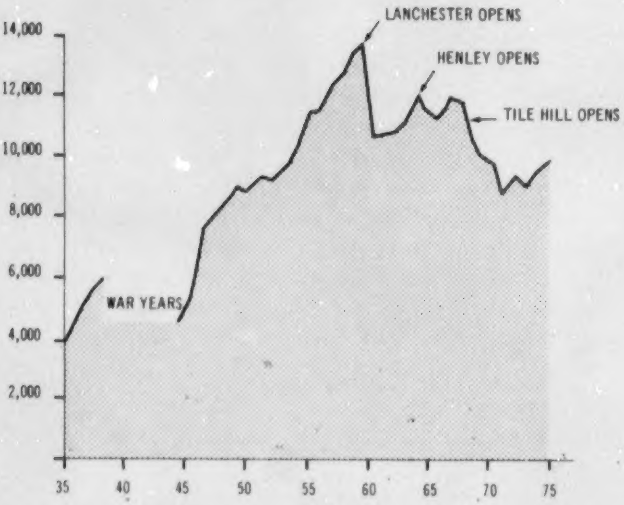
1) Op.cit. ref. 13/
2) Ibid.

Figure 2. **STUDENT ENROLMENTS AT COVENTRY TECHNICAL COLLEGE, 1935-1974**



YEAR	ENROLMENT NUMBERS
1935/36	3816
1936/37	4812
1937/38	5446
1938/39	5910
1939 – 1943 figures unreliable	
1944/45	4401
1945/46	5010
1946/47	7310
1947/48	8067
1948/49	8165
1949/50	9092
1950/51	8804
1951/52	9306
1952/53	9329
1953/54	9476
1954/55	10211
1955/56	11448
1956/57	11837
1957/58	12385
1958/59	13014
1959/60	13683
1960/61	10706
1961/62	11495
1962/63	10824
1963/64	11224
1964/65	12212
1965/66	11504
1966/67	11155
1967/68	12287
1968/69	12033
1969/70	10775
1970/71	10034
1971/72	9047
1972/73	9505
1973/74	9243
1974/75	9765

Source : Arculus R. A. (1975), *Life Begins at 40: A Look at the History of Coventry Technical College.*

i) Craft Apprenticeships

The basis for providing a skilled labour force in manufacturing industry, which is so important in the Coventry region has for many years been the craft apprenticeship. The apprenticeship system derives from the practice in the Middle Ages whereby intending craftsmen were bound to a master, skilled in a particular craft, for a period of years during which he received training, eventually qualifying for recognition by the craftsmen as members of their fraternity. Elements of this tradition survive today with the Colleges as active partners with industry in training schemes for apprentices in crafts such as building, electronics and engineering. In engineering the patterns tends to be that apprentices spend their first year following a full-time college course in engineering skills. They then receive the remaining three years of their training within the industry, attending technical college for one day and one evening a week, the normal pattern for a day-release course. Apprenticeship courses illustrate the problems of relating educational provision to the needs of industry. During periods of economic recession firms tend to cut back their training programmes, which can make for serious problems within the colleges in relation to the provision of resources. An element of stability is provided by the Industrial Training Boards (ITBs). These bodies exist for the major industries and are funded partly through a levy on industrial concerns and partly by Central Government. Their role is to foresee the trend in demand for skilled workers in a particular sector within an area, apart from short-term fluctuations. They are able to fund students through ITB scholarships and so reduce what might otherwise be considerable year-to-year fluctuations. Thus in 1976 there were 90 engineering craft apprentices in the first year course at Henley Technical College of whom 30 were financed by the appropriate Industrial Training Board. Uncertainty concerning student numbers remains a major problem in the planning of further education, despite the close links with local industry that such courses engender.

ii) Technician Education

A major group of employees within manufacturing industry are technicians. It has been estimated that six qualified technicians are needed to support one industrial technologist. A whole range of courses have been devised in association with industry to meet this need, ranging from gas fitting, radio and electronics, electrical and mechanical engineering, to chemical and metallurgical technicians. This large section of vocational education is currently undergoing considerable changes as a consequence of the implementation of the Haselgrave Report.(1) A national body, the Technician Education Council (TEC) has been established to provide national standards for locally-devised courses. The overall objectives of the TEC programme are:

- To develop and provide policies for schemes of technical education for persons at all levels of technical occupations in industry and elsewhere.
- To rationalise existing provisions.
- To provide a system which is responsive to both industrial requirements and student needs.
- To be enabling rather than prescriptive (a more detailed statement is contained in Appendix 1).

Technician Education Courses are currently being developed in Coventry, mostly replacing the programmes which previously led to

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1) Op.cit. ref. 7.

Ordinary or Higher National Certificates. A feature of their planning is very close liaison with local industry which is represented on the subject panels responsible for the planning of programmes to be submitted to TEC for approval. They represent a real attempt to involve industry in planning courses for young people who will eventually enter their employment. Courses in civil engineering, building and for electrical technicians for example, have been submitted for approval, while programmes for telecommunications, and production and mechanical engineering are due to start in September 1977. It is worth considering how the engineering course has been developed in order to evaluate one of the ways education responds to local employment needs.

There is a body of evidence to suggest that there is a shortfall in the provision of technicians to serve the engineering industry in Coventry. Some support for this is provided by the number of students currently enrolled on mechanical and production engineering technician courses, which number over 700 at the three Technical Colleges. These courses consist of a number of Technician Certificate Courses which the new programme will replace. In March 1976 the first meeting of the TEC Consultative Committee was held. This committee was drawn from the Technical Colleges, the Polytechnic and from a wide range of local industries who employ engineering technicians. One month later the Further Education Sub-Committee of the Local Education Authority resolved that the planning of the course should proceed. A vital part of the planning process was the consultation with local employers to ensure that the course would fit their requirements as far as was possible. Another important objective was to rationalise the provision of technician education in the City so all three colleges worked together towards one joint proposal. It is hoped that closer liaison with industry will enhance the relevance of the programmes devised and that it will also reduce some of the uncertainty surrounding the demand for vocational education in the city. These programmes further emphasise the essentially local nature of vocational education which tends to operate in relation to the Coventry sub-region rather than for the wider compass of the West Midlands as a whole.

The counterpart of TEC for the service industries and for management is the Business Education Council (BEC); so far the exact nature of the courses to be provided is still under active discussion. In time similar programmes to those developed for TEC in Coventry will replace existing commercial and secretarial courses together with a range of programmes in management, accounting, public administration and banking. When both schemes are fully operational a great deal of rationalisation will have been achieved and the already well-developed links with local industry and commerce further strengthened.

iii) Courses for the unemployed

The rationale for regional planning focused upon regional imbalances reflected in unemployment. This problem which has once again become apparent has necessitated a response from the education sector, but at the local rather than the planning region level. A whole new area of educational provision has developed in recent years under the aegis of a number of bodies operating through the Manpower Services Commission. It is important to note that the MSC is organised on a scale approaching that of the Economic Planning Regions but in fact the areas are very different. Thus whereas Coventry is part of the West Midlands Economic Planning Region, it is part of a MSC area which embraces the East Midlands as well.

To 1975 the emphasis lay in the field of retraining adults who had become unemployed, through TOPS (the Training Opportunities Scheme) organised by the Training Services Agency. The local office of the TSA identifies an employment need and, in association with the colleges of further education, develops appropriate courses and then assists in the provision of employment at their conclusion. Currently TOPS programmes financed by TSA include secretarial and shorthand typing, computer programming, catering craft, management and family care. These measures apply to mature adults but during the last two years the focus has shifted to the unemployed recent school-leaver of whom there will be an estimated 4,000 or so in Coventry in September 1977. There is considerable variety in this provision. The first to be developed in 1975/76 consisted of fourteen weeks of vocational training in basic engineering, secretarial and residential care. The provision of these courses illustrates the way that the colleges respond rapidly to a new situation. One college was approached in October by TSA and asked to mount a course which was launched one month later, staffed by redundant industrial and commercial workers, employed on a part-time basis. The pattern of demand varies throughout the year. In September there are many unemployed school leavers but as the year proceeds some find employment; once again the further education sector must be flexible to match these fluctuations. A rare opportunity to meet regional demand came after the opening of the National Exhibition Centre 16km from Coventry. This has created a demand for hotel and catering staff. The TSA approached Henley Technical College and has provided funds for an extension to the college in order that more students can be trained in the catering field. Several TSA-sponsored pilot schemes for work-experience have also been developed. These provide 26 weeks of industrial experience during which the employer pays the young person a fixed weekly allowance which is reclaimed from TSA. The college provides a day release course in basic numeracy and literacy and general preparation for work.

Initially these schemes for the unemployed were seen as short-term measures but it is now realised that this is likely to be a feature of the economy for some time and may be structural rather than a passing phenomenon. The Holland Report, 'Young People and Work' recently examined the provision of opportunities for unemployed young people, and its proposals envisage some rationalisation of courses with a greater emphasis on general preparation for work but still recognising that local problems require appropriate local solutions.(1) Not all of this work lies within the education sector, but inevitably a good deal of the response will have to come from further education; already 4.4 per cent of all full- and part-time students in this section of Coventry's Education Service are involved with TSA or Industrial Training Board Schemes. The variable nature of this demand places a burden upon the colleges, although they have faced such problems before. One way that this variability is catered for is in the employment of part-time staff who constitute 25 per cent of the total staff in some departments. The problem of matching the varying demands of both industry and unemployed remains considerable.

IV. CONCLUSION

Policies for regional development have a long history in the United Kingdom. Their origins lie in the argument and advocacy of academics and planners in the last decades of the nineteenth century who recognised that long-term fluctuations in regional economic performance were an important consequence of the industrialisation of the U.K. economy. The case for government intervention in the regions was debated at great length throughout the inter-war period and though clouded by the years of national economic depression in the 1930s, the seriousness of the problem as documented by the Barlow Report was such that all post-war governments have recognised a responsibility to try and minimise regional disparities.

As regional policies have evolved over the last 30 years so there have been associated developments in the theory and practices of regional planning. Despite the obvious complexity of major regions in advanced economies, it should in theory be possible, using techniques of regional analysis, to identify the major components of change in a region, to investigate their long-term implications, and

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1) Young People and Work (The Holland Report). Manpower Services Commission, 1977.

on these lines to arrive at predictions of the state of the region at specified dates in the future. The consequences of this path of development can then be assessed and evaluated, and policies introduced to steer the region towards the most desirable goal. The regional strategy so produced serves as a guideline to investment and development decisions in supporting systems such as education. Thus a programme of development for education including decisions on course changes, building, staffing, and resources, can be devised which satisfies the requirements of the evolving economy of the region. In theory, therefore, education should form an integral part of policies for regional development.

The situation in practice, however, falls far short of this utopian ideal as this report has shown. Despite their apparent sophistication, techniques of regional analysis have proved only partially successful in identifying the rates of change of the various components of regional structure. Particular shortcomings have been experienced with population projections which have consistently failed to produce reliable estimates of future population levels. This is especially serious given the key role of population change in regional performance and the fact that it is the prime determinant of the size and nature of supporting systems such as education, transport, and housing. Thus the post-war expectation was that the population of Great Britain would increase from 46.6m in 1941 to 47.5m in 1951 and would then decline to 47.2m in 1961 and 46m in 1971: in fact the figure for 1951 was 48.8m, for 1961 51.3m, and for 1971 54.0m. The situation in the West Midlands was even more serious because of the failure to estimate levels of migration and in particular the decentralisation of urban populations which has occurred on a massive scale since the mid-1960s. For example, in 1952 Birmingham published the Report of Survey for its Development Plan which took as its basis a population projection from the Registrar General which stated that the population of the city would rise to 1,227,900 in 1971. In fact the 1971 figure was 1,014,670 and has fallen since then.

Despite these difficulties a wide range of regional development policies have been pursued in the United Kingdom over the last thirty years. The extent to which they incorporate considerations of education is largely dependent upon the mechanisms through which long range regional economic objectives can be translated into educational terms. The formal structures which link the education service with the process of regional policy machinery are, however, highly complex as this report has shown. The three basic functions of policy-making, education planning, and regional administration, each operate at a variety of levels and with respect to an assortment of different areas. Thus, for example, regional strategies are formulated for the ten Economic Planning Regions, but any educational implications must be recognised by the local education authorities. These differences in levels and areas of responsibility and interest are especially serious with respect to further and higher education which is largely responsible for the mix of specialist skills present in the labour force. They have been compounded in recent years by changes in the structure of local government and by the creation of new organisations, such as the Manpower Services Commission, which have added further levels and areas to an already complex system.

An important consequence of these structural and areal mismatches is that it has not been possible to incorporate education within regional development policies except in the most general of terms so that there are few, if any, examples of ten- or twenty-year educational programmes included in regional strategies. Instead of 'lead', the situation is one of 'lag' in that education responds retrospectively to the changing needs of the regional economy. Despite the conceptual attractions of rolling programmes of educational development linked to local requirements, there is obvious merit in a responsive strategy for the education service. This is the case for both school education, which is highly sensitive to fluctuations in birth rate, and for further and higher education which, because it is non-compulsory, is subject to variable demand. For a responsive strategy to be effective, however, the service must be able to adjust positively and rapidly to changing circumstances. It is clear from the detailed survey of further and higher education in Coventry that such a response is possible despite, in many cases, the highly variable nature of local needs.

It is clear that educational planning contains both long-term and short-term elements. Longer-term planning may be facilitated through the development of TEC and BEC courses; some fluctuations may be eased through the work of the Industrial Training Boards, but the traditional pattern of rapid response to a rapidly changing economic situation is likely to continue to be the norm in further education. It has been established that the links between educational planning and regional development plans are tenuous. Since vocational courses are for the most part developed in response to local rather than regional needs, this pattern might also be expected to remain. Within further education a few courses look to the national market, whereas in higher education this tends to be the norm. For the future, the most significant developments in respect of vocational training may well take place within the schools. There is a growing feeling that school should be much more of a preparation for work than has hitherto been the case. The government has initiated a national discussion of the role of education in society entitled 'the great debate'. A fundamental question in this discussion must be the purpose of education. The challenge for educational planning is to provide programmes which satisfy the needs and aspirations of those who receive education and the demands of the society they will enter. If education is to meet this challenge, it must retain and develop the flexibility evidenced in this report to respond to changes in supply and demand.

Appendix 1

OVERALL OBJECTIVE OF TEC PROGRAMME

- To develop and provide policies for schemes of technical education for persons at all levels of technician occupations in industry and elsewhere.
- To rationalise existing provisions.
- To provide a system which is responsive to both industrial requirements and students needs.
- To be enabling rather than prescriptive.

SOME CRITERIA

1. TEC programmes should transmit a body of knowledge and a command of certain skills and techniques increasing capacity to learn, to adapt to new situations, communicate successfully with others and develop attitudes of responsibility.
2. Be acceptable to the student (personal and vocational needs) as well as meeting Employer needs.
3. Be at least comparable with existing technician awards (e.g. ONC, HNC, etc.) and those overseas.
4. Be acceptable to Professional Bodies, ITBs,etc., and the EEC.
5. Be acceptable in higher education for admission to degree and comparable courses.
6. Help improve the status of the technicians in the community.

TEC AWARDS

(a) Certificate
(b) Diploma
(c) Higher Certificate
(d) Higher Diploma

Comparability with Existing Awards

a) Certificate and Higher Certificate

1. Certificate

   Approximately half-way between C & G Parts I and II (T3) or equalling to an ONC.(1)

2. Higher Certificate

   Approximately equivalent to C & G Parts II and III (combined) or equalling to the HNC.(1)

b) Diploma and Higher Diploma

An extension of Certificates in which, whilst technical depth may be similar, the breadth of content is likely to be greater.

Cannot be compared directly with OND or HND but likely to have the same currency.(1)

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1) Subject to the nature of individual programmes.

Résumé du rapport technique n° 6

POLITIQUE REGIONALE ET PLANIFICATION DE L'ENSEIGNEMENT AU ROYAUME-UNI L'EXEMPLE DE COVENTRY ET DES WEST MIDLANDS

par

A.G. Parton, D. Clark et R. Aitken

Bien que la planification régionale au Royaume-Uni, qui remonte à une quarantaine d'années, ait eu pour origine les difficultés d'emploi et de main-d'oeuvre, ce n'est que récemment que la planification de l'enseignement y a été incluse. Cet aspect de la politique régionale sera examiné ici par référence aux trois principaux niveaux de prise de décisions politiques, les niveaux inter-régional, intra-régional et local. Des exemples sont empruntés à la Région de planification économique des West Midlands et à la ville de Coventry.

LE NIVEAU INTER-REGIONAL

L'objectif de la planification inter-régionale est d'abord une distribution équitable des ressources entre les régions, au moyen de stimulants destinés à attirer entreprises et travailleurs dans les zones déprimées et à les dissuader d'en partir. Il s'agit notamment de subventions pour la formation en vue des qualifications nécessaires dans ces zones, tant en ce qui concerne l'apprentissage que le matériel pédagogique et la formation des adultes. En outre, des allocations de réinstallation permettent le transfert du personnel nécessaire pour implanter les unités de production et les équipements et former un noyau de main d'oeuvre. Des indemnités de retour sont aussi prévues pour la main-d'oeuvre qualifiée qui aurait abandonné la région assistée.

La plupart des programmes de recyclage sont mis en oeuvre dans des Centres publics de formation situés dans les zones assistées et indépendants du système éducatif. Au Royaume-Uni, à part l'Université, ce sont les Autorités locales de l'éducation qui administrent le système éducatif ; elles interviennent également dans la planification, notamment en matière de programmes. L'enseignement post-obligatoire non universitaire, qui remonte au XIXe siècle, relève des Autorités locales depuis 1944 et touche un large public. En 1956, l'enseignement secondaire a été fortement restructuré en un système quadruple : écoles supérieures techniques (transformées depuis 1965 en universités techniques relevant des autorités centrales), collèges régionaux, collèges de district et collèges locaux. Depuis 1966, des écoles polytechniques ont été créés et, plus récemment, des collèges d'enseignement supérieur, dépendant des autorités régionales, ont largement pris en charge la formation des maîtres. Toutes ces institutions sont partiellement financées par des ressources locales, sur l'utilisation desquelles les autorités locales ont leur mot à dire.

LE NIVEAU INTRA-REGIONAL

Depuis 1965, des conseils régionaux de planification économique, formés de représentants des divers intérêts sociaux en jeu, et assistés de leurs Bureaux, exercent leur compétence sur dix régions de programmation. L'une d'elles, les West Midlands, région en développement, attractive de population, bien dotée en industries de croissance, et qui ne bénéficie pas, de ce fait, des stimulants décrits plus haut, connaît cependant des problèmes de qualification. Sa population active est en effet sous-qualifiée par rapport aux emplois spécialisés qui peuvent lui être offerts et la fonction de gestion est également sous-équipée en personnel compétent.

Depuis 1969, des plans stratégiques régionaux ont tracé les grandes lignes d'action des Autorités locales pour un terme de vingt ou trente ans. Malgré l'importance qui lui est reconnue en principe, l'éducation est en fait négligeable dans ces plans. C'est ainsi que le plan pour les West Midlands, centré sur l'investissement, la population, l'habitat, l'emploi et l'activité économique, ne traite de l'éducation et de la formation qu'en un seul paragraphe et se borne pratiquement à un court plaidoyer au faveur de la mobilité professionnelle.

Cependant, cette lacune est quelque peu comblée par les responsabilités en matière de programmes de formation dont sont investies les Autorités locales de l'éducation et les conseils de gestion des collèges qui sont sous leur contrôle : la représentation, dans ces derniers, de tous les intérêts socio-économiques concernés conduit à une certaine concordance avec les objectifs de la planification économique.

LE NIVEAU LOCAL

Depuis une réforme intervenue en 1974, les Autorités locales représentent à la fois les comtés et les districts et administrent deux sortes de zones : métropolitaines et non-métropolitaines. Dans les secondes, l'éducation et sa planification sont gérées par les autorités des comtés mais, dans les zones métropolitaines, la gestion est partagée entre les conseils des comtés et ceux des districts. A partir de 1947, des plans quinquennaux ont été élaborés, mais l'enseignement n'y a occupé qu'une place négligeable et n'a été mentionné qu'à propos de l'aménagement des terrains destinés à la construction d'écoles. Depuis 1968 cependant, des plans structurels locaux (équivalents des plans stratégiques régionaux) relatifs à la destination des sols incluent l'aspect éducatif. En conjonction avec divers départements ministériels, les autorités locales assument la responsabilité de la planification et des dépenses qui y sont afférentes.

Ainsi la zone métropolitaine de Coventry, qui a connu un développement extraordinairement rapide après la guerre exigeant un contrôle strict de l'environnement du fait de la croissance du secteur manufacturier, a implanté un vaste réseau d'enseignement à tous les niveaux : pré-primaire, primaire, secondaire et post-obligatoire (further education). Ce dernier terme couvre une multiplicité de services éducatifs : enseignement professionnel, formation des adultes, culture générale. L'enseignement supérieur est représenté par l'Université de Warwick.

Le Conseil du district de Coventry a élaboré un plan de développement de dix ans où l'enseignement supérieur et post-obligatoire se voit reconnaître son rôle dans la création de qualifications et l'attractivité de la région. Malgré l'évolution démographique, on prévoit un accroissement de la demande d'éducation post-obligatoire au cours des dix prochaines années.

Dans l'enseignement supérieur, le Collège de formation pédagogique de Coventry est l'un des plus réputés pour la formation des enseignants et a un débouché essentiellement local (les prévisions démographiques ont conduit à réduire le nombre de ses étudiants de près de la moitié). De son côté, l'Ecole polytechnique de Lanchester, créée en 1966, assure un enseignement court préparant aux professions dans l'industrie et le commerce et aux professions libérales, parfaitement adaptable à l'évolution des besoins. La demande sociale maintient cependant un large secteur d'enseignement général, qui reste majoritaire. Le débouché de l'école, qui assure aussi un enseignement à temps partiel, dépasse les limites de la région.

Depuis environ un siècle, l'éducation post-obligatoire est largement orientée vers la formation professionnelle requise par les entreprises industrielles et commerciales. Les cours sont organisés par les établissements en liaison avec les responsables de la formation dans les entreprises. Les Collèges se sont adjoints des organes consultatifs formés de représentants du monde économique qui, trois fois l'an au moins, donnent leur avis sur le contenu des programmes.

Cependant, ces organes ne représentent guère que la grande industrie et les besoins des petites firmes ne sont pas pris en considération. Au niveau post-obligatoire, les trois principaux champs d'action de la formation professionnelle sont :

i) l'apprentissage, effectué par un stage en entreprise suivi d'un enseignement alterné ; ces programmes risquent d'etre réduits en période de récession, mais les Industrial Training Boards jouent un certain rôle régulateur grâce à leurs prévisions spécifiques ;

ii) la formation des techniciens (dont le ratio d'utilisation est évalué à six pour un technicien supérieur) : de nombreux cours ont été organisés à cette fin selon des normes établies au niveau national, mais les besoins ne sont pas couverts et les autorités locales s'efforcent de planifier ce domaine et de diversifier les programmes ;

iii) cours pour les chômeurs : lors des dernières années, une série d'organismes, sous l'égide de la Commission des services de l'emploi, se sont efforcés de faire face à ce besoin.

CONCLUSIONS

Force est de reconnaître que la planification régionale n'a pas entièrement réussi à prévoir l'évolution des composantes de la structure régionale, notamment en matière de projections démographiques ; et on saisit les conséquences de cette lacune en matière de migration, de logement, de transport, d'éducation. Dans ce dernier domaine, la relation avec la planification régionale est particulièrement complexe en fonction des différents niveaux éducatifs et des différenciations au sein des régions. Cette complexité joue surtout en ce qui concerne les compétences spécialisées nécessaires pour l'emploi. La création d'organismes nouveaux à compétences variées n'a pas toujours simplifié les problèmes.

En fait, il n'a guère été possible jusqu'à présent d'inclure l'école dans la planification régionale, d'autant que la réponse de l'éducation à l'évolution des besoins est essentiellement rétrospective. Aussi la nécessité d'une adaptabilité rapide du système se fait-elle sentir et l'expérience de Coventry est-elle intéressante à cet égard. Etant donné le désir exprimé de plus en plus souvent de voir l'école jouer un meilleur rôle dans la préparation à la vie active, le gouvernement a ouvert à ce sujet ce qu'on appelle "le grand débat". La finalité de la planification éducative est de satisfaire à la fois les besoins et les aspirations des demandeurs d'éducation et les demandes de la société à laquelle ils vont se joindre.

Rapport technique N° 7

ETUDE DE LA RELATION ENTRE LA FORMATION ET L'EMPLOI AU NIVEAU REGIONAL : LE CAS DE LA FRANCE

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Introduction

LE CONTEXTE FRANCAIS

A la différence d'autres pays Membres de l'OCDE, la France présente une structure politico-administrative fortement centralisée. C'est pourquoi, pendant longtemps, la dimension régionale des problèmes socio-économiques était pratiquement inexistante dans les politiques de développement. En effet, le pouvoir de décision étant localisé au niveau central, les régions se contentaient d'exécuter les ordres provenant de la capitale.

Sans être bouleversé, cet état de chose devait quelque peu évoluer, surtout à partir des années 1960, la politique d'industrialisation accélérée nécessitant un redéploiement des activités économiques dans l'espace. C'est ainsi qu'afin de définir une politique cohérente d'aménagement du territoire, les pouvoirs publics créèrent en 1963 la Délégation à l'aménagement du territoire et à l'action régionale (DATAR).

La politique d'éducation n'échappait pas à la règle centralisatrice ; de plus, son développement ne tenait pas compte des données socio-économiques régionales puisque, jusqu'en 1963, l'implantation d'établissements scolaires relevait, la plupart du temps, d'initiatives individuelles. Par la suite, afin de répondre à une demande massive d'éducation et aux objectifs de la réforme instituant la scolarisation obligatoire au niveau du 1er cycle de l'enseignement secondaire, le ministère de l'Education nationale met en place la carte scolaire définie en ces termes par son secrétaire général, comme

> "Le réseau des établissements permettant à une population donnée de disposer, à portée, des formes d'enseignement correspondant aux différentes orientations."

A partir de ce moment, l'enseignement commence à être intégré au contexte local puisque la carte scolaire s'intéresse à des facteurs démographiques et spatiaux : effectifs à accueillir par région - répartition selon les zones de recrutement scolaire et les mécanismes d'orientation (spécialités et niveaux de formation), le résultat recherché étant une meilleure adaptation aux besoins.

Malgré ces améliorations, la politique de formation ne s'insère toujours pas dans le cadre d'un développement régional intégré puisque les choix sont déterminés en fonction d'une moyenne nationale et des orientations prévisionnelles dictées par le Plan.

En effet, compte tenu du développement de l'emploi industriel et tertiaire et de la diminution de l'emploi dans l'agriculture, la ventilation des élèves à la sortie de la classe de 3e secondaire était fixée de la manière suivante par le Ve Plan (1966-1970) :

25 %	vie active et inadaptés	
40 %	second cycle court	11 % agricole 55 % économique et administratif 34 % industriel
35 %	second cycle long	5 % agricole 62 % classique et moderne 17 % commercial 16 % industriel

Comme on peut le constater, bien que l'on ait émis le souhait d'envisager certaines adaptations locales, il s'agit essentiellement de décontracter au niveau régional des mesures adoptées par l'autorité centrale. Ces mesures s'inscrivent dans une politique qui satisfait les besoins de la croissance sectorielle en privilégiant la mobilité des hommes et en sacrifiant le développement régional.

On comprendra mieux, après ce bref historique, que les travaux sur l'enseignement dans le développement régional ne se soient développés que récemment et qu'ils aient été, du moins à leur début, fortement imprégnés par des méthodes d'analyse se situant dans la ligne de la planification et de la mesure statistique appliquée au niveau national.

I. LA MESURE DES BESOINS DE FORMATION AU NIVEAU REGIONAL

Dans cette partie, seront présentées les principales recherches destinées à évaluer en chiffres les besoins de formation professionnelle nécessaires au système productif régional. Cette appréhension quantitative de la relation emploi-formation au niveau régional s'est traduite par la réalisation de deux groupes d'études :

- le premier s'inscrit dans le cadre de la planification et sert donc à l'élaboration de diagnostics ;
- le second fait partie de l'information statistique générale dont on veut souvent qu'elle explique des phénomènes difficilement quantifiables.

1. LES ETUDES CONDUITES SOUS L'ANGLE DE LA PLANIFICATION

Elles concernent d'une part les travaux effectués dans les deux régions(1) de la Façade méditerranéenne, et d'autre part, l'exercice sur la confrontation régionale entre emplois et formations mené dans le cadre du "groupe technique de prévision emploi-formation" du VIIe Plan (1976-1980).

La prévision des besoins en formation dans les régions de la Façade méditerranéenne(2)

L'étude sur la prévision des besoins en formation professionnelle a débuté en 1972 sous l'influence de deux facteurs :

- le facteur national : le fort taux de croissance imprimé à l'industrie française avec redéploiement dans l'espace prévu pour le VIe Plan :
- le facteur régional : l'installation du complexe industriel de Fos-Etang de Berre dans un midi méditerranéen peu industrialisé.

En 1972, les régions de la Façade méditerranéenne se caractérisaient par :

- un faible pourcentage d'emplois industriels salariés puisqu'il atteignait un peu plus de 21 % de l'emploi salarié non agricole ;
- le déclin des industries traditionnelles ;
- un volume important d'emplois tertiaires ;
- et un taux de chômage élevé.

Compte tenu de cette situation, les administrations devaient s'interroger de façon générale sur la manière de déterminer les besoins en formation professionnelle selon les nécessités du développement régional et particulièrement sur les besoins nouveaux occasionnés par l'implantation d'un puissant complexe industriel.

Avant de décrire la démarche utilisée et de présenter les principaux résultats obtenus, il faut préciser d'emblée qu'aucune réflexion sur les relations emploi-formation au niveau régional n'a précédé le lancement de l'étude. On ne sera donc nullement étonné de constater que des méthodes nationales aient servi à l'analyse de problèmes locaux. Cette transposition est d'autant plus préjudiciable que le but donné aux investigations entreprises dans les deux régions était l'élaboration d'un diagnostic et d'un pronostic quantifié sur les besoins en formation professionnelle justifiant un programme d'action adéquat.

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1) Provence-Côte d'Azur et Languedoc-Roussillon.

2) Cf. dossier N° 12 du Centre d'études et de recherches sur les qualifications (CEREQ) "La prévision régionale des besoins en formation : application aux pays de la Façade méditerranéenne" - Documentation française.

La recherche fut donc délibérément orientée dans l'optique des grands déséquilibres macro-économiques. Toutefois, contrairement au parti qui a été adopté par l'Intergroupe formation-qualification professionnelle(1) de ne pas traduire les besoins de recrutement en besoins réels de formation, le pas a été franchi par les instances régionales de la Façade méditérranéenne.

La méthode

Le schéma n° 1 indique les différentes étapes du raisonnement qui a été suivi. On peut y voir que le dispositif technique repose sur l'analyse prévisionnelle du volume d'emplois et des formations :

- les prévisions de stocks d'emplois par niveaux de qualification et secteurs d'activités sont transformées en besoins de recrutement de la population active (expansion + renouvellement) en l'absence de mobilité professionnelle ;
- les flux prévisionnels de sortie de l'enseignement technologique aux niveaux III, IV et V sont calculés et ventilés dans les 47 groupes de formation.(2)

Le choix a porté sur l'élaboration de projections statistiques tendancielles à moyen terme (1972-76), afin de préserver les comparaisons avec la situation passée.

L'opération centrale consiste à confronter de façon normative les besoins de recrutement aux sorties prévisionnelles de l'appareil de formation.(2) A cette fin, la transformation des emplois en types et niveaux de formation a été entreprise au moyen d'une table de passage permettant la correspondance entre un poste de la nomenclature des emplois (en 294 postes) et un poste de la nomenclature nationale des formations (47 groupes et 6 niveaux).

Les résultats bruts

Pour chaque groupe de formation, on dispose d'un tableau qui assure la comparaison chiffrée entre les besoins de recrutement et les flux de sortie de l'appareil scolaire, comparaison sur laquelle se feront les prévisions au niveau du département et de la région.

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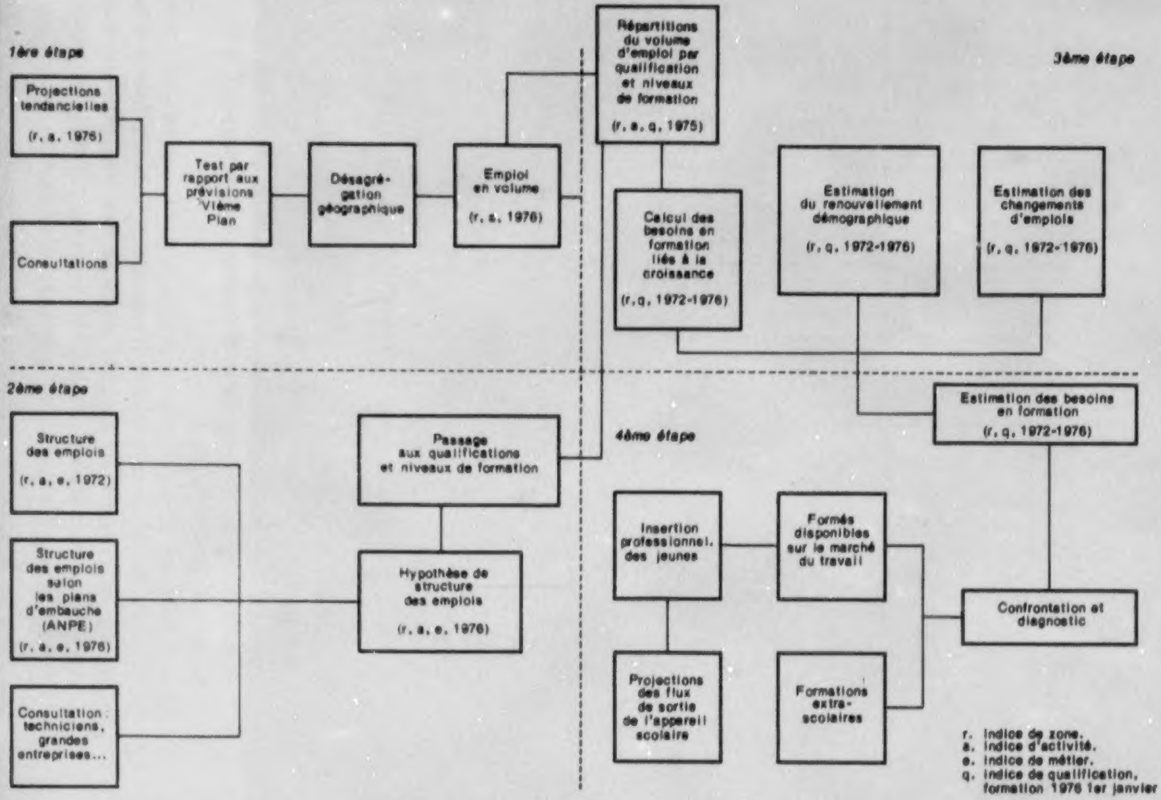
1) "En raison de l'insuffisance notoire de la connaissance sur les conditions de passage entre le monde de la formation et le monde du travail, les besoins de recrutement, même traduits en types et niveaux théoriques de formation, n'ont pas été convertis en besoins réels de formation. Ce parti a été adopté pour mieux marquer la limite des évaluations obtenues et pour éviter qu'il en soit fait des interprétations abusives." (Rapport Intergroupe formation-qualification professionnelle, VIe Plan, p. 125.)

2) Cf. en annexe page 271 la nomenclature des formations en 47 groupes et la définition des niveaux.

Schéma 1 **SCHEMA DES TRAVAUX DE PROJECTION D'EMPLOIS ET DE FORMATIONS**


1ère étape
Projections tendancielles (r, a, 1976)
Consultations
Test par rapport aux prévisions VIème Plan
Désagrégation géographique
Emploi en volume (r, a, 1976)
Répartitions du volume d'emploi par qualification et niveaux de formation (r, a, q, 1975)
3ème étape
Calcul des besoins en formation liés à la croissance (r, q, 1972-1976)
Estimation du renouvellement démographique (r, q, 1972-1976)
Estimation des changements d'emplois (r, q, 1972-1976)
2ème étape
Structure des emplois (r, a, e, 1972)
Structure des emplois selon les plans d'embauche (ANPE) (r, a, e, 1976)
Consultation : techniciens, grandes entreprises...
Passage aux qualifications et niveaux de formation
Hypothèse de structure des emplois (r, a, e, 1976)
Estimation des besoins en formation (r, q, 1972-1976)
4ème étape
Insertion professionnel. des jeunes
Formés disponibles sur le marché du travail
Projections des flux de sortie de l'appareil scolaire
Formations extra-scolaires
Confrontation et diagnostic

r. indice de zone.
a. indice d'activité.
e. indice de métier.
q. indice de qualification, formation 1976 1er janvier 1976.

Voici un exemple du tableau de comparaison emploi/formation du département des Bouches-du-Rhône pour le groupe 08 "Production et première transformation des métaux".

Groupe de formation	Niveaux	I.Actifs à recruter compte tenu de la croissance			II.Actifs à recruter compte tenu du renouvellement		Total à recruter annuellement	Flux de sortie de l'appareil de formation initiale 1970-1976 moyenne annuelle
		Nombre d'emplois en 1972	1972-1976	Moyenne annuelle	1972-1976	Moyenne annuelle		
08 : production et 1ère transformation des métaux	IV Techniciens	67	104	26	12	3	29	13
	V Ouvriers qualifiés	1 041	936	234	160	40	274	6
	Total	1 108	1 040	260	172	43	303	19

Cette comparaison montre un fort déséquilibre aux niveaux IV et V. En effet, les besoins ont été estimés annuellement à 303 personnes alors que 19 personnes sortent chaque année du système de formation initiale.

On aboutit donc à l'estimation d'un écart. Mais que signifie-t-il? C'est la question essentielle.

De l'indicateur statistique auquel la méthode de travail utilisée permet d'aboutir, il convient de faire une interprétation prudente.

a) supposons un instant que l'analyse passée révèle un écart de même ordre : si le secteur n'a pas connu antérieurement de goulets d'étranglement graves, cela implique nécessairement l'existence de forces équilibrantes qui échappent à la comparaison chiffrée ;

b) les données statistiques utilisées dans les calculs sont peu fiables du fait de l'imperfection des nomenclatures d'emploi ou de la convention adoptée pour passer des emplois aux formations, qui suppose l'absence de transférabilité entre formations et emplois de contenus différents.

Les risques d'erreurs sont d'autant plus grands que les grandeurs que l'on compare sont faibles. Les comparaisons faites dans les départements de la Façade méditerranéenne ont à cet égard utilisé, par souci de précision, des nomenclatures trop fines (en 294 emplois et 47 groupes et 6 niveaux de formation).

On se trouve ainsi devant une situation pour le moins surprenante ; elle consiste à monter un dispositif macro-économique lourd sur la prévision des besoins en formation professionnelle qui débouche sur le constat, en termes statistiques, d'un manque d'ouvriers qualifiés ou de techniciens s'élevant à quelques unités. Dans la réalité, ce type de besoins relève de la formation continue et se règle généralement dans le cadre des politiques de formation des entreprises.

Conscient de ces limites, le groupe bi-régional a développé des analyses plus qualitatives visant à mieux saisir les mécanismes d'ajustement régionaux et locaux entre emplois et formations.

La recherche des facteurs d'équilibre

La compréhension des relations complexes entre emplois et formation a incité le groupe à examiner un certain nombre de questions ; les principales concernent :

- le devenir professionnel des jeunes au terme de leur formation initiale,
- les conditions d'accès aux emplois,
- les plans d'embauche des entreprises.

Où vont les jeunes gens et les jeunes filles au terme de leur formation professionnelle initiale?

L'enquête sur l'accès à la vie professionnelle des jeunes sortis de l'enseignement technologique, agricole, paramédical et social, réalisée par les services académiques d'information et d'orientation a permis :

- d'obtenir des coefficients d'insertion servant à corriger le volume de la demande additionnelle d'emplois qualifiés ;
- de mettre en évidence les différences régionales dans l'accès des jeunes à la vie active.

On donnera à titre d'exemple les résultats fournis par l'enquête menée en Languedoc-Roussillon pour les jeunes ayant le niveau du Certificat d'Aptitude Professionnelle (CAP) ou du Brevet d'Etudes Professionnelles (BEP) en mécanique générale :

Flux de sorties initiaux : 3 827
Ont un emploi : 2 181
Ont un emploi dans la région : 1 374
Ont un emploi dans la région et dans leur spécialité : 797

On note que sur 100 jeunes diplômés, 79 seulement occupent un emploi (le reste est au chômage, poursuit des études ou accomplit son service militaire).

Le groupe 10 (mécanique générale) accuse des pertes sensibles puisque sur 3 827 formés, il n'en reste plus que 797 disponibles pour les métiers de mécanicien en Languedoc-Roussillon. Si le taux de chômage est faible (7 %), le taux d'émigration, en revanche, atteint 24 % des actifs du groupe (les départs se font surtout vers la Provence-Côte d'Azur), ce qui nous incite à penser que la structure économique du Languedoc-Roussillon ne peut actuellement offrir des emplois d'ouvrier qualifié de la mécanique en nombre suffisant. De plus, l'inadéquation qualitative entre formation et emploi est forte puisque 42 % des actifs titulaires d'un CAP ou d'un BEP de mécanique occupent des emplois ne correspondant pas à leur formation.

Dans quelles conditions les habitants de la région peuvent-ils accéder aux nouveaux emplois industriels créés par le complexe de Fos, en fonction notamment de leur formation initiale ou complémentaire?(1)

Cette recherche conduite par Chenu démontre l'importance des types de processus de production dans l'accès aux emplois et les liens qui s'établissent alors entre les formations et les emplois.

Il choisit un échantillon S de salariés qu'il répartit en quatre strates correspondant aux types de production suivants :

M : salariés des chantiers industriels

A : salariés d'usines dans lesquelles prédomine le travail autonome de l'ouvrier qualifié

B : salariés d'usines dans lesquelles machines et travailleurs sont intégrés dans un processus centralisé prenant en général la forme d'une chaîne

C : salariés d'usines dans lesquelles prédomine la production automatisée.

En ce qui concerne l'aspect formation, l'analyse révèle le rôle secondaire que joue le diplôme scolaire dans l'accès aux emplois d'ouvrier qualifié. L'embauche est la plupart du temps déterminée par l'expérience professionnelle et la recommandation. Toutefois, certaines différences apparaissent selon les processus de production. Ainsi, le diplôme intervient en partie pour l'obtention d'un poste d'ouvrier qualifié dans les processus B et C, alors qu'il intervient rarement dans les strates M et A.

L'étude précise en outre comment les travailleurs perçoivent la fonction des formations post-scolaires. S'ils considèrent la formation professionnelle pour adultes (FPA) comme un moyen de changer de qualification ou de métier, en revanche, ils situent la formation continue dans le prolongement de leur emploi actuel.

Bien que cette recherche fut conçue à l'intérieur du dispositif mis en place dans les régions de la Façade méditérannéenne, elle présente des aspects méthodologiques dépassant le cadre de l'espace

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1) Volume No. 9 de la bibliothèque du CEREQ : "L'accès aux emplois industriels - effet de l'aménagement régional : Fos Etang de Berre - Marseille. A. Chenu - Documentation française, Paris, 1975.

étudié. C'est pourquoi nous lui accorderons d'autres développements dans la deuxième partie.

Les entreprises ont-elles des plans d'embauche à moyen terme?

Il a été rapidement admis que la réussite de ce type d'investigation était soumise :

- au choix d'un horizon temporel court (6 mois)
- à une distinction essentielle entre deux groupes d'entreprises selon l'influence, dominante ou non, qu'elles exercent sur l'orientation du marché du travail.

A cette double condition, l'enquête s'avère utile pour le choix d'actions à court terme, mais non pas pour la prévision à moyen terme, comme l'idée en avait été initialement avancée par les partenaires régionaux.

Cet ensemble d'études, contrairement à la méthode centrale de prévision, ne part pas nécessairement du postulat selon lequel une formation donnée correspond à un emploi déterminé. Il consiste à décrire la manière dont les individus - qui entrent dans la vie active ou qui s'y trouvent - accèdent à des emplois et à rechercher les facteurs qui expliquent le plus fréquemment ces placements.

Recommandations sur l'appareil éducatif

En Provence-Côte d'Azur, à partir de la confrontation emploi-formation, et après l'avis des experts(1), certaines recommandations sur le développement des formations professionnelles ont été proposées.

Nous donnons à titre d'exemple les résultats(2) relatifs à deux groupes de formation :

04-05 - Génie civil, bâtiment
10 - Mécanique générale

La confrontation statistique emploi-formation se présente ainsi (voir page suivante) :

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1) Inspecteurs principaux de l'enseignement technique, responsables de l'industrie, représentants de syndicats ouvriers.

2) Ces résultats sont extraits du rapport du groupe d'étude de la Façade méditerranéenne : "Etude sur l'évolution de l'emploi et ses conséquences sur l'adaptation de l'appareil de formation".

Groupe de formation	Niveaux	Nombre d'emplois en 1972	Besoins annuels dus à l'expansion sur la période de 71-76 A	Besoins annuels dus au renouvellement - période 72-76 B	Total à recruter A + B	Flux de sortie de l'appareil de formation initiale (1970-76) moyenne annuelle	Effectifs disponibles après enquête insertion	Flux de sortie de l'appareil de formation continue 1970-76 (moyenne annuelle)	
								Formations professionnelles ultérieures	Formations complémentaires spécialisées
04-05 Génie civil, bâtiment	IV	7 760	145	321	225	100	95		
	V	67 346	1 044	2 315	1 623	556	518	718	44
	Σ	75 106	1 189	2 639	1 848	656	613	718	44
10 Mécanique générale	IV	5 822	109	182	291	775	357	290	275
	V	39 105	894	1 493	2 387	2 483	2 118	391	668
	Σ	44 927	1 003	1 675	2 678	2 678	2 475	681	943

Ces premiers résultats ont ensuite été détaillés par spécialités de formation afin de permettre la comparaison avec les métiers correspondants.

Pour les deux groupes retenus, les conclusions sont les suivantes :

Secteurs considérés	L'appareil de formation doit-il être réduit, développé ou rééquilibré?	Observations
Bâtiment et travaux publics (BTP) 04-05 Génie Civil, Bâtiment		L'appareil de formation initiale doit être développé à condition que, par un effort important d'information, le recrutement des élèves puisse s'amplifier dans ses sections. Il est suggéré, pour ces métiers déficitaires, de multiplier les lieux de formation en rapprochant l'école technique du domicile. L'apprentissage demeure une filière essentielle de formation : il reste à construire dans la région le C.F.A. des Alpes-Maritimes. Plus particulièrement, dans l'hypothèse où l'effort souhaité en matière de formation initiale ne se produirait pas, il conviendrait de développer les structures de la formation continue notamment en ce qui concerne les travailleurs immigrés.
. Maçons (V)	à développer	
. Ouvriers qualifiés du travail du béton armé (V)	à développer	
. Agents de maîtrise du BTP (V)	à développer	
. Spécialistes du BTP et métreurs (IV)	à développer	

Secteurs considérés BTP	L'appareil de formation doit-il être réduit, développé ou rééquilibré?	Observations
10 Mécanique générale et de précision		
. Mécaniciens sur machines et automobiles (V)	à rééquilibrer	L'appareil de formation laissant apparaître un déséquilibre entre le métier de mécanicien (excédentaire) et celui d'ouvrier professionnel sur machine et d'ajusteur (déficiteire), la formation continue peut être utilisée pour assurer des passages entre les emplois.
. Ouvriers professionnels sur machines (V) (tourneurs, fraiseurs, rectifieurs)	à rééquilibrer	
. Ajusteurs (V)	à rééquilibrer	

La confrontation emploi-formation au niveau régional : les travaux du VIIe Plan(1)

Ces travaux s'inscrivent dans le cheminement retenu par le Groupe technique de prévision emploi-formation du VIIe Plan pour l'analyse détaillée des mécanismes d'ajustement entre le système éducatif et le système productif. Précisons que le Groupe technique de prévision était commun à la Commission de l'éducation et au Comité de l'emploi et du travail. Il était chargé de fournir à ces deux instances les données prévisionnelles nécessaires à la préparation du VIIe Plan et de formuler les principales questions révélées par la confrontation emploi-formation aux niveaux global, sectoriel et régional.

Avant de procéder à la description de la démarche régionale adoptée dans les travaux du VIIe Plan, il convient de rappeler que, pour la première fois, cette dimension figure dans l'analyse des liaisons emploi-formation lors de l'élaboration du plan. C'est sans conteste un progrès dans la compréhension des relations qui existent entre les systèmes d'emploi et de formation à travers l'espace, progrès qu'il faut toutefois nuancer en précisant l'objet principal de la prise en compte du phénomène régional dans un plan national.

Les planificateurs considèrent en effet l'approche régionale comme un élément qui doit permettre de mieux éclairer la situation nationale en identifiant les principales disparités territoriales ignorées dans l'analyse globale. Il s'agit donc essentiellement de déceler les grands problèmes inter-régionaux consécutifs à l'application d'une politique nationale de développement qui impose aux régions un ensemble de contraintes socio-économiques définies au niveau central.

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1) Cf. l'annexe III du rapport du Groupe technique de prévision emploi-formation du VIIe Plan, p. 278 à 348 - Documentation française.

La confrontation statistique entre besoins professionnels de recrutement et sorties de l'appareil de formation

a) la méthode

On traitera dans ce paragraphe de l'exercice statistique et de ses résultats. Mais auparavant, on comparera la méthode VIIe Plan, à celle qui a été mise en oeuvre sur la Façade méditerranéenne, en distinguant en quoi la première se rapproche ou se distingue de la seconde.

La méthode VIIe Plan est tout d'abord semblable à la première car elle consiste toujours à comparer les besoins de recrutement par profession évalués à partir des prévisions d'emplois aux sorties de l'appareil de formation initiale converties dans une nomenclature commune.

Elle se distingue par la méthode de prévision de l'emploi par qualification qui utilise les résultats d'un modèle économétrique incluant des données sur le fonctionnement du marché du travail (modèle du CESDR)(1) et qui se situe à un niveau global : utilisation d'un code de professions agrégées (DPJ en 9 postes)(2).

Le modèle du CESDR, selon ses auteurs, a pour objet de permettre "la présentation coordonnée, sous forme de tableaux comptables, de l'état présent et prospectif des principales variables socio-économiques (population, emploi, revenu etc.) qui jouent un rôle au niveau de la région et des zones infra régionales". De la sorte, les sorties chiffrées du modèle tiennent compte implicitement des facteurs déterminant les mécanismes du fonctionnement du marché du travail régional ou local. Les renseignements sur l'évolution de la structure des emplois sont donc plus en prise avec le contexte socio-économique de la région.

La démarche utilisée dans les travaux du VIIe Plan se distingue aussi de celle qui a été appliquée dans les deux régions de la Façade méditeranéenne par le fait qu'elle a été conçue dans une optique inter-régionale qui doit permettre d'éclairer la politique nationale par la mise en évidence des principaux déséquilibres spatiaux.

b) le type de résultats

Au cours de l'exercice Plan, on a pu dégager deux types de résultats complémentaires sur la confrontation emplois-formation : le premier fournit une comparaison des potentiels globaux de

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1) Cf. Le modèle "Simulation du développement régional" (SDR) à moyen terme pour la France.
Note de présentation (janvier 1975) - INSEE - CESDR.

2) Code DPJ en annexe.

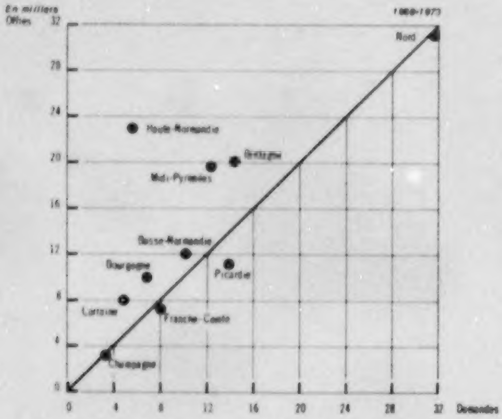
qualification de l'offre et de la demande d'emplois (stock), le second renseigne, quant à lui, sur la variation de ces mêmes variables (flux).

Ces résultats sont présentés sur deux périodes de durée égale : 1968-1973 et 1976-1981. Comme on peut le constater, le choix de deux périodes comparables, l'une passée, l'autre prévisionnelle, a pour but de dégager des tendances d'évolution et non pas de porter des jugements absolus.

L'offre et la demande potentielles.

On donnera à titre d'exemple les résultats de la confrontation entre l'offre et la demande potentielles pour la profession 4 : ouvriers qualifiés sur les deux périodes quinquennales considérées :

OPJ4 : LES OUVRIERS QUALIFIES



Sur la période 1968-1973, les niveaux comparés des variations de l'offre et de la demande d'ouvriers qualifiés révèlent, pour les régions étudiées, un manque d'actifs ou, au mieux, une situation équilibrée.

Entre 1976 et 1981, si la tendance générale est à l'équilibre, on note toutefois une dégradation du côté de l'offre qui affectera la Lorraine et la Champagne mais surtout la région Nord-Pas de Calais. Cette dernière subit les effets combinés de la restructuration de son industrie traditionnelle et la récession générale.

Pour cette profession, un bilan quasi équilibré est envisagé au plan national.

Les besoins de recrutement et les sorties du système éducatif.

La confrontation entre les besoins de recrutement et les sorties du système éducatif est effectuée par le calcul d'un indicateur $\text{KRA} = \frac{\text{Besoins de recrutement}}{\text{Flux de formation}}$. Il permet de donner des ordres de grandeur sur la tendance et le niveau des grands déséquilibres par profession.

Le tableau ci-dessous fournit les valeurs que prend l'indicateur pour les ouvriers qualifiés dans trois régions de programme :

DPJ4 : OUVRIERS QUALIFIES

Régions	Besoins de recrutement Flux de formation	
	1968-1973	1976-1981
Champagne	0,49	0,75
Franche-Comté	0,67	0,57
Aquitaine	0,61	0,53

Ces résultats permettent de penser que :

- sur les deux périodes étudiées, l'appareil économique régional ne fournit pas assez d'ouvriers qualifiés compte tenu de la production du système éducatif ;
- si la situation tend à s'améliorer pour la Champagne, elle se dégrade pour les deux autres régions.

C'est volontairement que nous avons choisi des régions qui présentent des similitudes quant au sens des déséquilibres. Cela montre à quel point la méthode comptable écrase des situations régionales fort disparates et peut de ce fait être à l'origine d'interprétations abusives.

Afin de réduire ces risques d'erreurs, on a cherché, par le traitement de données hors modèle, à mieux comprendre le pourquoi de ces déséquilibres.

Explication des résultats : nécessité de dépasser l'approche comptable

L'exemple de la DPJ4 "ouvriers qualifiés" cité précédemment pour trois régions ne permet pas de comprendre l'origine de ces déséquilibres ni d'entrevoir quels sont les facteurs spécifiques de chaque région qui entreront en jeu pour les réduire.

En effet, au vu de ces résultats on peut conclure que compte tenu des déficits observés auparavant, la tendance générale est à la déqualification des emplois indépendamment des particularités de chaque région. On serait donc amené à envisager des mesures nationales visant à une meilleure qualification des emplois offerts, en admettant que les effets d'une telle politique toucheraient de manière égale les différentes régions.

Or si l'on a pu constater, au plan national, un phénomène général de déqualification, cela ne veut pas dire pour autant qu'il ait la même ampleur ni qu'il se manifeste de la même façon selon le contexte économique concerné.

C'est justement afin de saisir ces différenciations que l'on a rassemblé un certain nombre de données statistiques qui sortent du cadre comptable de la confrontation stricto sensu.

On a donc réuni des éléments qui concernent :

- la structure économique de chaque région en mettant en évidence les principales disparités et en soulignant les degrés de spécialisation ;
- le potentiel de qualification de la population active en 1968 saisi à travers les diplômes ;
- la structure des flux de sorties de l'appareil de formation initiale;
- le taux de chômage régional.

L'analyse de ces différentes données permet de nuancer la nature des déséquilibres comptables en les rapprochant d'une réalité contrastée, précédemment nivelée.

Ainsi, pour la Franche-Comté et l'Aquitaine, les principales caractéristiques que l'on a pu rassembler se présentent comme suit en ce qui concerne :

. le tissu économique :

Les secteurs transferts (Agriculture et Bâtiment et travaux publics)qui participent largement aux mouvements de main-d'oeuvre sur le marché du travail régional sont différemment représentés dans les deux régions :

(estimation 1974)

	% de l'emploi global	
	Franche-Comté	Aquitaine
Agriculture	10,8 %	17,4 %
BTP	6,9 %	9,2 %

Les caractéristiques sectorielles des deux industries sont contrastées. En effet, alors que l'industrie Franc-Comtoise est fortement spécialisée dans : la première transformation des métaux, l'automobile et les industries mécaniques, l'Aquitaine est peu spécialisée et l'on note la présence d'industries traditionnelles : Industries agro-alimentaires, Cuir, Bois.

. la structure des emplois(1) :

La place des ouvriers de production dans l'emploi total est plus forte en Franche-Comté (68,4 %) qu'en Aquitaine (56,9 %).

. le taux de chômage :

Il a toujours été plus élevé en Aquitaine qu'en Franche-Comté même en période de crise générale de l'économie nationale : en 1975,

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1) Enquête sur la structure des emplois (ESE) 1973.

il s'établissait à 7.1 % pour l'Aquitaine et à 4.6 % en Franche-Comté.

. les flux de sorties du système éducatif

La part des sorties du niveau V technique sur la période 68-73 atteint 18,4 % des sorties globales en Franche-Comté et 12,7 % en Aquitaine ; alors que dans le même temps la part des ouvriers qualifiés dans la structure des emplois (toujours d'après l'ESE) est respectivement de 28 % et de 32,2 %.

A la suite du rassemblement de ces quelques données socio-économiques et compte tenu des résultats de l'exercice de confrontation proprement dit, on peut faire le constat suivant pour la Franche-Comté et l'Aquitaine.

. les deux économies régionales sont fortement contrastées :

- les niveaux de déséquilibres entre besoins de recrutement et sorties de l'appareil de formation sont semblables pour les ouvriers qualifiés.

De la sorte, si des déséquilibres comptables identiques entre emplois et formations peuvent se produire pour des régions aussi différentes, cela suppose que les facteurs qui y contribuent ne sont pas forcément les mêmes, ou du moins n'agissent pas avec une intensité égale.

Ainsi, si l'approche statistique permet de révéler des déséquilibres quantitatifs, elle ne rend pas compte de leur origine. Cela pose le problème de savoir quelles sont les forces régionales qui entrent en jeu pour aboutir à une situation d'équilibre ou de déséquilibre.

On est donc conduit à s'interroger sur les différents facteurs qui sont susceptibles de modifier la relation formation-emploi.

En ce qui concerne les besoins de recrutement, quatre éléments peuvent intervenir :

- le premier, d'ordre technique, a trait à la mobilité professionnelle : ce facteur joue aussi bien dans le sens d'une déqualification que dans celui d'une promotion occasionnant un gain de qualification. Or, la méthode utilisée dans les travaux du Plan considère ce phénomène comme égal dans toutes les régions puisque ce sont les résultats de l'enquête FQP(1) qui ont été appliqués.
- le second, d'ordre quantitatif, se traduit par une variation du volume global de l'emploi régional. En effet, on peut noter, dans une région donnée, une création absolue d'emplois nettement insuffisante qui atteint tous les niveaux de qualification.

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1) Enquête de l'Institut national de la statistique et des études économiques (INSEE) : Formation-qualification professionnelle.

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La cause de déséquilibres est donc à rechercher dans le niveau général de croissance de l'économie régionale. Ce phénomène toucherait davantage l'Aquitaine que la Franche-Comté ; celle-ci souffre d'un manque d'emplois chronique si l'on se réfère au taux de chômage de 1975 qui s'élève à 7.1 %.

- le troisième, d'ordre qualitatif, est la conséquence non seulement d'une transformation dans l'organisation du travail des activités existantes, mais aussi de la structure de qualification des nouvelles implantations, qui nécessiterait par exemple une demande d'ouvriers qualifiés inférieure à la demande constatée dans le passé(1).

Ainsi pour l'Aquitaine, la restructuration des activités traditionnelles du Bois et du Cuir a pour effet, entre autres, une utilisation massive d'ouvriers spécialisés.

- les phénomènes migratoires contribuent à atténuer les déséquilibres quantitatifs et qualitatifs.

Du côté de l'appareil de formation, les évolutions discordantes entre les flux de sorties et la demande de l'appareil productif ne résultent pas a priori de causes identiques. Il convient donc de procéder à une analyse poussée de l'interdépendance entre les systèmes éducatifs et productifs.

Compte tenu des caractéristiques du marché du travail régional, les modalités d'insertion peuvent varier selon les régions.

Il est par ailleurs possible que dans un marché de l'emploi tendu, où le taux de chômage est élevé, les nouveaux emplois peuvent être occupés aussi bien par les chômeurs que par les jeunes entrant en activité.

Cette concurrence provenant de la variation du stock d'inactifs se double d'un phénomène de concurrence plus qualitatif entre formés sur le tas et sorties du système de formation initiale.

Un dernier point qui mérite d'être souligné concerne l'appréciation du volume des jeunes qui reçoivent un enseignement de type AFPA.(2)

Remarque sur l'utilisation des résultats par les décideurs

Bien que non prévus à cet effet, ces travaux ont contribué à la prise de décisions au plan régional. Ainsi telle région - à l'appui

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1) Le développement de l'aérospatiale, de la chimie et de la métallurgie et la régression, voire la disparition, d'industries traditionnelles se sont traduits au niveau de la main-d'oeuvre par : "l'abandon des qualifications traditionnelles au profit de postes nouveaux de réglage ou de techniques de fabrication laissant l'ouvrier moins libre dans l'organisation de sa tâche". Economie et Humanisme n° 230 "Regards sur l'Aquitaine - réflexions sur le problème régional" juillet/août 1976.

2) Association pour la formation professionnelle des adultes (organisme public dépendant du ministère du Travail).

de résultats révélant un besoin important de recrutement de personnes peu qualifiées - a adopté des mesures qui s'inscrivent dans le cadre des "programmes d'actions prioritaires" nationaux sur l'emploi : elles se sont traduites par des stages de pré-formation et/ou de préparation à la vie professionnelle de jeunes non formés.

Il s'agit là de mesures touchant au problème général des jeunes sans formation qui se présentent chaque année sur le marché du travail ; les conclusions des travaux régionaux du VIIe Plan sont donc davantage un prétexte qu'une justification des actions entreprises au niveau des régions.

Conclusion

Les méthodes utilisées dans le dispositif Façade méditerranéenne et dans l'exercice de confrontation emploi-formation pour le VIIe Plan supposent, comme on a pu la noter, un ajustement permanent entre l'offre et la demande de qualifications où l'on ne reconnaît que des déséquilibres marginaux. Ces méthodes reposent sur l'hypothèse d'un marché du travail parfait dont il s'agit de corriger les déséquilibres.

Ces présupposés théoriques amènent à considérer :

- que la structure des professions est rigide ;
- qu'une structure "optimale" de la combinaison productive (capital, travail) ne varie qu'en fonction de l'évolution des techniques et des modifications dans les prix relatifs des facteurs ;
- que les postes laissés vacants à la suite de départs provoquent des embauches immédiates dans les mêmes professions, alors que plusieurs cas peuvent se présenter : suppression des postes, promotion interne (marché interne), embauche sur un autre poste par suite d'une réorganisation ;
- que les liaisons entre emplois et formations sont simples : relation biunivoque entre les emplois et les formations.

Il est donc nécessaire de manipuler avec précaution les résultats issus de ce genre d'approche. En effet, s'ils permettent d'apprécier à un niveau agrégé (DPJ) les grands déséquilibres remarquables entre groupes d'emplois et de formations, ils ne peuvent en aucun cas conduire à la définition des besoins de formation et moins encore à la détermination d'une politique précise en matière d'emploi et de formation.

Cette mise en garde est d'autant plus importante que l'on assiste à des interprétations poussées des résultats issus de ce genre d'analyse. C'est ainsi que l'on relève dans le document sur la Provence-Côte d'Azur les conclusions suivantes dictées par l'exercice Façade méditerranéenne.

"Il est dès lors possible d'infléchir dans le sens souhaité par l'évolution économique le système éducatif-régional,...d'établir une carte des spécialités véritablement adaptée aux besoins,...de faciliter l'orientation scolaire et professionnelle."(1)

2. L'ANALYSE A BASE D'INDICATEURS STATISTIQUES

Ce type d'analyse est souvent effectué dans une optique inter-régionale, elle a pour but :

- de repérer et d'interpréter les différences pouvant exister entre les régions.
- d'essayer de déterminer l'évolution de ces différences dans le passé et de prévoir ce qu'elles pourraient devenir.

Il s'agit d'une approche purement statistique, l'étude de séries chiffrées devant permettre de donner une explication sur l'évolution dans l'espace et le temps des phénomènes observés (ici le développement économique, l'emploi, la formation). Elle concerne aussi bien les structures régionales que les mouvements.

Etude des structures régionales

Pour étudier la diversité des situations régionales on utilise des indicateurs.

Notion d'indicateur

La notion d'indicateur régional(2) est décalquée sur la notion d'indicateur social ; c'est une série chiffrée calculée dans un découpage déterminé, associée à une situation qu'elle est censée caractériser au mieux.

Se plaçant dans une optique inter-régionale, les variables sont donc examinées pour toutes les régions, sans que cela signifie qu'elles soient les plus pertinentes au niveau de chacune d'elles ; mais elles offrent l'avantage de permettre une comparaison avec la France entière entre les diverses régions (Exemple : le taux d'activité des femmes de 20-25 ans).

En choisissant certains seuils, on peut classer et regrouper les régions et définir ainsi certaines zones.

Se plaçant d'un point de vue national pour faciliter l'étude de la diversité régionale, on peut rechercher à regrouper les régions autour de quelques grands axes. (Exemples : opposition est-ouest en

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1) "Etude sur l'évolution de l'emploi et ses conséquences sur l'adaptation de l'appareil de formation" - Groupe d'étude de la Façade méditerranéénne - Région de Provence-Côte d'Azur.

2) TRECA - Analyse régionale et indicateurs régionaux des collections de l'INSEE R 16-17.

ce qui concerne le développement économique, les revenus ; opposition nord-sud en ce qui concerne les niveaux d'éducation.)

La notion de disparité

Elle se réfère généralement à un écart par rapport à une situation repérable par quelques indicateurs. Pour mesurer cet écart on a été amené à calculer des indices de disparité intra-régionale et de disparité inter-régionale.

La disparité s'évalue par rapport à la spécificité. La spécificité de la classe i dans la région j, c'est le rapport du nombre d'éléments de la classe i dans la région j au nombre total d'éléments dans la région divisée par le même rapport pour la France entière.

a) Disparité intra-régionale

- Spécificité d'une région : comparaison de la répartition des éléments i d'une région j à la répartition des mêmes éléments pour la France entière. Si la spécificité Si j = 1, cela signifie que la proportion des éléments dans la région j est égale à la proportion correspondante dans la France entière. Plus l'écart entre la spécificité et l'unité est grand, plus la proportion régionale s'écarte de la proportion nationale.

- La disparité intra-régionale est une mesure synthétique de la différence de la répartition des éléments de la région à la répartition correspondante pour la France entière.

b) Disparité inter-régionale d'une classe

La disparité inter-régionale est une mesure synthétique de la différence de la répartition de la classe i entre les régions à la répartition de tous les éléments dans les diverses régions.

En bref, la disparité intra-régionale concerne la structure inter-classe d'une région, tandis que la disparité inter-régionale concerne la structure inter-régionale d'une classe.

L'interprétation des disparités

L'une des conclusions qui est parfois avancée à la suite de l'étude de l'évolution des disparités régionales est qu'on assisterait à une certaine uniformisation de l'espace national.(1) Les disparités, tout en restant importantes, auraient tendance à s'atténuer.

Sans vouloir contester que durant la période 1962-1970 on a assisté à la diffusion d'un bon nombre d'activités dans l'espace national, cette "tendance à l'uniformisation" soulève plusieurs questions :

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1) TRECA : Indicateurs régionaux et analyse régionale, Collection de l'INSEE R 16-17.
Durieux : "La décentralisation est surtout le fait de l'industrie" - Economie et statistique, n° 62, décembre 1974.

- au niveau de la mesure du phénomène
- au niveau des interprétations qu'on en tire.

a) Au niveau de la mesure du phénomène

Les indices de spécialisation sont généralement calculés en définissant une "distance" entre régions. Mais le problème est-il seulement une question de technique statistique?(1) En dernière analyse on retient la distance qui semble la plus conforme au "bons sens", ce qui laisse la discussion ouverte.

Si la tendance à l'uniformisation des structures sectorielles régionales peut déjà se discuter, celle qui concerne les structures professionnelles est encore beaucoup plus contestable.

Durieux(2), malgré les réserves qu'il émet sur l'indice de spécialisation professionnelle utilisé (regroupement très synthétique en 11 postes, calcul à partir de l'enquête structure des emplois dont le champ exclut les entreprises de moins de 10 salariés, l'agriculture, les administrations et les services domestiques) et les résultats qu'il obtient (8 régions s'écartent de la moyenne observée dans l'ensemble du pays), croit pouvoir affirmer que les structures professionnelles tendent à se rapprocher.

b) Au niveau des interprétations qu'on en tire

La conclusion de Durieux parait pour le moins imprudente : "L'évolution de l'emploi régional ne parait pas traduire de tendance à la division régionale du travail, le seul mouvement qui puisse paraître préoccupant pour la Bretagne est l'augmentation du pourcentage des emplois sans qualification particulière."

Pourtant cette notiòn d'uniformisation des structures régionales conduit parfois(3) à émettre l'idée "qu'on pourrait substituer à une classification instantanée des régions une hiérarchisation temporelle de celles-ci en ce sens que certaines d'entre elles peuvent être considérées comme une avant-garde, d'autres une arrière-garde dans un chemin qu'elles emprunteraient toutes".

L'extrapolation mécaniste à partir des évolutions statistiques constatées dans le passé parait dangereuse en raison de :

- la fragilité de certains indicateurs statistiques,
- du fait qu'on ne prend pas suffisamment en compte le contexte économique dans lequel les évolutions passées se sont produites, à savoir la forte expansion industrielle de 1962 à 1970.

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1) C. Thelot (cf. Economie et statistique, décembre 1974).

2) B. Durieux :"la décentralisation est surtout le fait de l'industrie"- Economie et statistique n° 62, décembre 1974.

3) TRECA - Indicateurs régionaux et analyse régionale, INSEE R 16-17.

- enfin, parce qu'en agissant ainsi on suppose que chaque région a une assez grande autonomie de développement, ou l'on admet que la politique d'aménagement du territoire maîtrise parfaitement le développement régional ; ce qui est *sous-estimer grandement la stratégie des entreprises* qui peut varier dans le temps et l'espace.

L'étude des mouvements

Jusqu'à une époque récente, l'étude a été centrée sur les mouvements affectant les hommes :

- *Mobilité professionnelle* : avec l'enquête Formation-qualification professionnelle (FQP) dont la première date de 1964, et les enquêtes annuelles sur l'emploi (inutilisables au plan régional, voir partie I).
- *Migration* : à travers les recensements (pour la première fois en 1962-1968).

Des études sur les flux intersectoriels ou les flux interrégionaux ont permis d'appréhender :

- leur volume
- les caractéristiques des personnes concernées
- le sens des échanges
- les soldes.

C'est un peu la "théorie des vases communicants" : on ne se pose pas trop de questions sur le "vase d'origine" ni sur le "vase d'arrivée", sur les déformations possibles ni les raisons de celles-ci. Au niveau de l'étude de la mobilité professionnelle Thelot(1) a, lors de l'analyse des résultats de l'enquête Formation-qualification professionnelle, tenté, à l'aide du fichier des établissements, de replacer ces mouvements des individus dans le cadre des remaniements du tissu industriel provoqués par la restructuration qui a affecté les divers secteurs.

Pour cadrer l'étude des migrations, on ne disposait que d'éléments finalement assez grossiers sur l'évolution des structures régionales, alors que la restructuration de l'économie a évidemment une dimension spatiale importante.

D'autre part, on ne se posait pas de question sur les effets de la segmentation sociale, professionnelle et géographique du marché du travail (la fermeture d'une usine dans le Nord aura-t-elle les mêmes conséquences pour un cadre, un employé, un ouvrier?).

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1) C. Thelot (*Economie et statistique* n° 5).

- **Mouvements concernant les entreprises**

Il a fallu attendre 1974 pour qu'une étude systématique soit faite sur la déformation du tissu économique à partir du fichier des établissements de l'INSEE.

Pour mieux comprendre les mouvements affectant les travailleurs, il est essentiel d'étudier la création et la suppression d'établissements et d'emplois.

II. LA COMPREHENSION DES RELATIONS EMPLOI-FORMATION

Parallèlement à l'analyse globale effectuée en termes statistiques, le CEREQ, avec d'autres centres de recherches, participe à des études ponctuelles visant à une meilleure connaissance des interactions entre systèmes d'emploi et de formation qui sont mal appréhendées dans les approches quantitatives précédemment citées.

Ces études, dont le champ se situe au niveau local ou régional, n'ont vraiment de sens que si le marché considéré dans l'espace régional n'est pas homogène et transparent.

Une étude faite par le CEREQ sur la mobilité professionnelle et les migrations(1) s'est efforcée d'apporter des éléments d'appréciation sur la structuration et la configuration spatiale du marché du travail en fonction du niveau de diplôme et de la catégorie socio-professionnelle.

MOBILITE PROFESSIONNELLE ET MIGRATIONS

L'étude effectuée par le CEREQ prolonge celle faite par Thelot(2) à partir de l'enquête Formation-qualification professionnelle (1965-1970) qui montre l'importance des mouvements affectant les personnes déjà entrées dans la vie active.

L'ensemble de ces mouvements (changements de secteur d'activité, changement d'établissement, changement de catégorie socio-professionnelle, etc.) qu'on désigne généralement sous le terme "mobilité professionnelle" constitue un élément essentiel dans le fonctionnement du marché du travail.

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1) "Migrations d'actifs par niveau de diplôme" (essai d'approche au travers de la mobilité professionnelle) CEREQ.

2) Economie et statistique n° 51, décembre 1973.

Cependant, on distingue souvent deux sortes de mobilité professionnelle(1) qui correspondent à deux types de mouvements difrérents : d'une part, les mouvements sectoriels et régionaux effectués par les actifs en réponse plus ou moins directe à l'offre d'emploi des différents secteurs ou région et, d'autre part, les mouvements "verticaux" définis comme le passage d'une catégorie socio-professionnelle à une autre, des filières pouvant être définies à l'intérieur desquelles on distinguera des promotions et des régressions.

On envisagera ici seulement le premier type de mobilité professionnelle qui semble le plus lié à des considérations économiques. Dans l'optique des relations emploi-formation, on peut alors poser deux questions :

- Quelle est l'influence du niveau de diplôme sur la mobilité professionnelle (représentée par les changements d'établissement)?
- Cette influence est-elle la même pour la mobilité professionnelle considérée dans son ensemble que pour celle qui entraine un déplacement géographique (migrations)?

Thelot, après avoir situé l'importance de la mobilité professionnelle (1/3 des personnes occupées en 1965 et 1970 ne travaillant plus dans le même établissement) montre que les non-diplômés sont les plus mobiles. Les diplômes secondaires généraux protègent du changement : les titulaires du BEPC ou du Brevet élémentaire en particulier sont très peu mobiles. Les diplômes supérieurs ne favorisent pas non plus la mobilité.

Les titulaires des diplômes techniques, en particulier ceux du niveau CAP, mais à un degré moindre, changent aussi fréquemment d'entreprises que les non-diplômés.

L'étude faite par le CEREQ apporte des éléments de réponse à la seconde question. Après avoir montré que moins de la moitié des changements d'établissement avaient entrainé des migrations, 15 % se traduiront par un changement de région ; elle met en évidence les faits suivants :

- les actifs ayant un niveau de diplôme peu élevé CEP-CAP(2) (au maximum), qui sont les plus mobiles, sont aussi ceux qui émigrent le moins.
- pour les actifs ayant des diplômes d'enseignement général supérieurs au CEP et des diplômes techniques supérieurs au CAP, le changement d'établissement entraine plus fréquemment un déplacement géographique.

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1) Economie et statistique n° 51, décembre 1973.

2) Certificat d'études professionnelles (Niveau de formation VI) et Certificat d'aptitude professionnelle (Niveau de formation V) voir Annexe 2, p. 273.

Pour l'ensemble des actifs, le marché du travail apparait segmenté du point de vue géographique (55 % des changements d'établissement s'effectuant à l'intérieur de la commune, 75 % ne dépassant pas le cadre du département). Cette segmentation est influencée par le niveau de diplôme et la catégorie socio-professionnelle. Pour les moins diplômés (ouvriers et certains employés), il y a une rotation de main-d'oeuvre importante dans un cadre géographique limité, par contre pour les cadres et techniciens, cette rotation est moins intense mais entraine des déplacements plus importants.

L'ACCES AUX EMPLOIS INDUSTRIELS - EFFETS DE L'AMENAGEMENT REGIONAL(1)

L'étude de l'accès aux emplois industriels citée plus haut mérite une attention particulière. En effet, elle sort des schémas classiques de quantification des besoins de formation et se situe dans la compréhension du fonctionnement du marché du travail. Elle traite non seulement de la sociologie de la formation des espaces industriels régionaux :

> "Etude de l'articulation d'implantations industrielles récentes par rapport au tissu industriel et aux marchés de la main-d'oeuvre locaux et régionaux" ;

mais aussi de la sociologie du travail par :

> "L'étude de la différenciation des qualifications requises chez les travailleurs, en fonction des techniques de production et des rapports sociaux caractéristiques des unités industrielles".

Cette analyse s'oppose donc aux démarches centrées sur les individus et a pour point de départ la caractérisation des unités collectives.

C'est ainsi que Chenu construit une typologie des modes de production susceptibles de co-exister ou non au sein d'une industrie donnée et compare des groupes d'individus engagés dans ces différents types de production en fonction d'une série de variables-clés.

Sans s'attarder davantage sur les principes de la méthode, on se bornera à exposer brièvement les principaux résultats qui confirment les limites des approches classiques d'appréciation de la relation emploi-formation effectuées :

a) en termes de secteurs d'activité : "les entreprises d'un même secteur forment souvent un ensemble très hétérogène et, réciproquement, des entreprises relevant de secteurs différents peuvent présenter de grandes similitudes" ;

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1) Volume n° 9 de la bibliothèque du CEREQ.

b) en termes normatifs qui supposent une correspondance mécanique entre emplois et formations : "les rapports entre le niveau de formation initiale (qu'elle soit générale ou professionnelle) et la classification sont très distendus".

En montrant que les biographies professionnelles des travailleurs de l'industrie tendent à se différencier en fonction des types de production dans lesquels interviennent ces travailleurs, l'analyse vérifie également l'hypothèse d'un processus de polarisation entre des situations de cumul d'avantages relatifs et des situations de cumul de désavantages relatifs ; à un pôle se trouvent les travailleurs qui sont à la fois les plus exposés au chômage et les moins armés en moyens d'adaptation à un nouvel emploi et chez qui prédominent les bas salaires, les qualifications les moins polyvalentes, l'appartenance à des firmes en situation difficile ; à l'autre pôle se trouvent les travailleurs pour lesquels ces facteurs changent de signe et représentent autant d'avantages cumulés.

Ce dernier résultat rejoint les théories de la segmentation du marché du travail (marché interne à l'entreprise et dualisme) dans lesquelles le critère de "stabilité" classe les travailleurs dans deux marchés :

- "primaire" où l'on trouve les travailleurs appartenant à des marchés internes structurés et qui bénéficient de tous les avantages ;
- "secondaire" qui concerne la main-d'oeuvre défavorisée (bas salaires, mauvaises conditions de travail, faible sécurité d'emploi).

Cette approche nouvelle du fonctionnement du marché du travail(1) émise principalement par Doeringer et Piore permet d'approfondir les relations emploi-formation car elle rompt avec les théories marginalistes peu probantes par les présupposés qui les sous-tendent : le modèle est parfait, les déséquilibres sont marginaux et traduisent des imperfections qui ne sont que des entraves à la concurrence parfaite.

ETUDE D'UN SYSTEME D'INFORMATIONS SUR LE MARCHE DU TRAVAIL DESTINE AUX DECIDEURS EN MATIERE DE FORMATION PROFESSIONNELLE

Objectifs et méthode

A travers l'objectif pratique qui ressort de l'intitulé de l'étude, ces travaux doivent contribuer à une meilleure connaissance

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1) Doeringer et Piore : "Internal labor Market and manpower analysis" - Heath Lexington Books - Lexington - Massachusetts 1971.
Piore : "Notes for a theory of labor market stratification" M.I.T. working paper n° 95 - octobre 72. Voir aussi l'article de Yves Dericaud sur la "segmentation du marché du travail : deux études de cas" in Etudes sur le marché du travail - I.E.E. Toulouse - 1975.

du rôle joué par la formation dans l'accès aux emplois et la structuration du marché du travail. Cette façon de poser les problèmes s'oppose aux méthodes adoptées dans les travaux de planification, car elle implique que soit rejetée toute approche globale des relations formation-emploi qui ne tiendrait pas compte des dimensions multiples de la fragmentation du marché constatée par ailleurs.

L'ignorance du rôle réel joué par la formation dans l'accès aux emplois et le fait de situer la démarche dans l'hypothèse d'une fragmentation du marché du travail ont conduit à l'adoption d'une méthodologie empirique permettant des analyses limitées.

La recherche a donc commencé par des études monographiques de marchés locaux du travail déterminés en fonction de certains types de formation.(1) Une grille d'analyse du marché du travail considéré a été proposée, dont les principaux éléments permettent d'élaborer un certain nombre d'indicateurs :

- indicateur de risque : il permet d'envisager un premier classement des formations suivant les risques d'excédent ou de pénurie de qualifications.
- indicateur de choix : comparaison à une zone d'emplois pour plusieurs formations différentes ou à une formation pour plusieurs zones différentes.
- indicateurs structurels.

Les résultats

Le petit nombre de cas étudiés ne permet pas encore de présenter un cadre homogène d'indicateurs applicables à toute formation.

Toutefois, un premier classement selon l'indicateur de risque a pu être opéré, comme le montre le tableau suivant (voir page 262).

III. POUR UNE ANALYSE INTEGREE DES SYSTEMES REGIONAUX D'EMPLOI ET DE FORMATION

L'analyse de l'enseignement dans le développement régional a été menée, comme on vient de le voir, sur deux plans :

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1) Cinq formations à finalité directement professionnelle ont été choisies :
- deux formations pour adultes : le CFPA de monteur de réseaux de distribution électrique et le CFPA d'agent d'entretien de matériel de piquage.
- trois formations du ministère de l'Education : les CAP du textile. Le BEP comptabilité mécanographie, la Baccalauréat de la construction mécanique (BTn F 1).

CLASSEMENT DES FORMATIONS SUIVANT "L'INDICATEUR DE RISQUE"

	Formations	Diffusion professionnelle des emplois	Diffusion géographique des emplois
RISQUE TRES ELEVE	CFPA agents d'entretien de matériel de piquage	Très réduite : dans l'industrie de l'habillement et chez les concessionnaires de machines. Emplois peu nombreux.	Théoriquement nationale, en fait régionale, avec une forte concentration dans la région toulousaine.
	CFPA monteurs de réseaux de distribution électrique	Réduite : les branches concernées sont principalement les branches NAE 345 (entreprises de réseaux et centrales électriques) et, accessoirement, 349 (installation d'électricité en bâtiment).	Régionale, et même extra-régionale (dans les départements limitrophes de la région Midi-Pyrénées).
RISQUE ELEVE	CAP textile	Limitée aux emplois d'exécution.	Très réduite : 2 zones d'implantation (Castres Mazamet, 81 et Lavelanet 09) qui n'entretiennent pas d'échanges de travail entre elles.
RISQUE FAIBLE	BEP comptables mécanographie	Très élevée : dans toutes les branches. Les emplois accessibles sont variés (comptabilité, mécanographie, mais aussi emplois de bureau et de banque).	Régionale : répartition relativement uniforme des emplois et de la formation à l'intérieur de la région.
	Baccalauréat construction mécanique	Peu de points d'entrée très réels mais importance de la poursuite d'études. Concentration dans les industries mécaniques. Diffusion possible dans d'autres branches. Variété des emplois offerts (ouvriers de production et d'entretien, bureaux d'études, méthodes, technico-commercial).	Régionale. Migrations importantes possibles.

- le premier, quantitatif, a pour objet la mesure chiffrée des besoins prévisionnels de formation ;
- le second, plus qualitatif, s'attache à l'étude et à la compréhension de phénomènes particuliers.

Les conclusions dégagées de ces deux groupes de travaux montrent les limites de ces approches lorsqu'elles ne sont pas intégrées, car elles ne permettent pas de saisir concrètement la réalité des interactions emploi-formation dans la dynamique du développement régional.

D'autres recherches, les unes concernant l'appareil productif, les autres l'appareil éducatif, rompent avec les schémas précédents bien que la relation formation-emploi ne soit pas articulée dans l'espace.

C'est pourquoi, après les avoir présentées succinctement, on tentera de fixer les grandes lignes de ce que pourrait une approche intégrée des problèmes d'emploi-formation en vue du développement régional.

TYPES D'ANALYSE POUR LE TISSU ECONOMIQUE ET L'APPAREIL EDUCATIF

Etude de la déformation du tissu économique et ses conséquences

Pour l'étude de la déformation du tissu industriel de la France durant la période 1961-1970, nous disposons des travaux effectués par l'INSEE et le CEDRAT.(1)

Les résultats de ces travaux

Après avoir montré, dans une première phase, que la création de nouveaux établissements était le principal facteur de déformation du tissu industriel, dans une deuxième phase, une enquête faite auprès des grands établissements a permis de déterminer la logique de leur création.

a) Les entreprises et secteurs concernés

Entre 1961 et 1970, sur 598 000 emplois industriels créés, 11 % à 92 % l'ont été par les grands établissements (100 salariés).

Il s'agit essentiellement des établissements de quatre secteurs - automobile, construction électrique, construction mécanique, chimie et caoutchouc - qui ont créé au total plus de 66 % des emplois industriels.

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1) Communauté du développement rural et de l'aménagement du territoire.

b) Les causes invoquées par les entreprises pour justifier les nouvelles implantations

- le manque de place ;

- l'aide des pouvoirs publics : elles interviennent particulièrement dans les entreprises multi-établissements des secteurs habillement, construction électrique, industries agricoles ;

- la recherche d'une meilleure localisation du point de vue des problèmes de main d'oeuvre. La sensibilité des entreprises se manifeste particulièrement dans les secteurs de la construction électrique, habillement, automobile. Il s'agit essentiellement d'une main d'oeuvre non qualifiée, ouvrier spécialisé et manoeuvre.(1)

L'analyse des résultats de l'enquête faite auprès des grands établissements suggère différents points dans la logique de création et de localisation des établissements durant la période 1961-1970.

Premier point : C'est une période de croissance industrielle.

Deuxième point : C'est une croissance qui a conduit les firmes les plus dynamiques à augmenter leurs capacités de production et, à cette occasion, à modifier les localisations de certaines de leurs grandes unités.

Troisième point : Dans le même temps, les pouvoirs publics mettaient en oeuvre une politique d'aménagement du territoire destinée à canaliser cette croissance industrielle vers les régions les moins développées ou en mutation.

On entrevoit ainsi l'influence de la stratégie des firmes et de la politique d'aménagement du territoire dans la déformation du tissu industriel.

Questions

Comment les entreprises ont-elles intégré leurs objectifs propres et les effets de la politique d'aménagement?

On peut essayer d'imaginer à l'aide d'un exemple le genre de considération qu'une entreprise est amenée à prendre en compte.

Exemple : Une entreprise de la région parisienne veut s'agrandir, elle manque de place. Elle est soumise à des contraintes dans la région parisienne - prix du terrain - pénalisation (procédure d'agrément). Donc elle a avantage a créer un établissement dans une autre région. Laquelle? Quel type d'établissement va-t-elle créer? Un établissement de fabrication? Quel sera le processus de travail utilisé? Exige-t-il beaucoup de main-d'oeuvre qualifiée ou de main-d'oeuvre non qualifiée? Quelle est l'importance des aides publiques, de l'Etat, les avantages fiscaux, les avantages accordés au niveau local (prix du terrain, etc.)?

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1) "Construction navale et aéronautique" recherche plutôt de la main-d'oeuvre qualifiée.

La recherche de main-d'oeuvre non qualifiée, l'importance des aides et avantages consentis pousseront à un choix vers une région économiquement défavorisée (chômage et sous-emploi chronique) ou en difficulté (restructuration).

Le choix pour une région où la main-d'oeuvre sans qualification est nombreuse n'est possible que parce que la firme, pour effectuer sa production, a besoin d'une masse importante de travail non qualifié. C'est donc tout le problème de la division du travail qui est posé, à la fois sur un plan général et dans sa dimension spatiale.

Ne peut-on pas alors se demander si la croissance des ouvriers spécialisés dans certains secteurs, jointe à la recherche du profit maximal par les firmes a rendu la décentralisation non seulement possible mais nécessaire.(1) La politique d'aménagement du territoire n'aurait alors fait, dans ce cas, qu'accélérer la nouvelle tendance de localisation des établissements.

La nouvelle physionomie du tissu économique

Il convient de situer l'importance, les caractéristiques de ces flux d'emplois industriels créés, leur impact au niveau des équilibres régionaux. L'emploi industriel n'est pas le seul concerné, mais il est souvent déterminant dans la mesure où il entraine des activités dites tertiaires (services rendus aux entreprises). Pour être exhaustif, il faudra examiner les nouvelles implantations tertiaires relevant d'une politique volontariste (services administratifs ou para-administratifs, grands établissements scolaires ou universitaires).

Les lignes de force de la transformation de l'espace national pourront être saisies mais non les effets indirects que ces changements introduisent dans le tissu économique local. Pour cela, il faudra avoir recours à des études plus fines au niveau régional.

L'appareil de formation

La mise en évidence de la diversité spatiale des situations sur le plan de la formation suppose que l'on aborde le problème à la fois sous l'angle quantitatif (intensité de phénomène) et sous l'angle qualitatif (type de filières proposées).

Il parait indispensable d'étudier simultanément les formations de type scolaire et l'apprentissage, tant les rapports peuvent être étroits entre les deux.

Les taux de scolarisation à certains âges au-delà de la scolarité obligatoire constituent un indicateur valable pour étudier la scolarisation différentielle des groupes sociaux et des unités géographiques.

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1) Michel Freyssenet - La Qualification du Travail - Travaux et recherches de prospective n° 57, DATAR (SESAME).

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Ils peuvent être calculés aux niveaux jugés les plus pertinents pour mettre en évidence la diversité des situations : villes selon la taille, circonscriptions administratives : académie, régions, département.

La scolarisation ne peut être étudiée indépendamment de l'apprentissage, qui apparait tantôt comme son complément, tantôt comme son concurrent. Il faut examiner si l'apprentissage s'adresse également aux filles et aux garçons, s'il concerne prioritairement certains types de métiers et lesquels? Et quelle est sa répartition spatiale? Ainsi, en France, il concerne surtout les garçons dans les professions du bâtiment et de l'alimentation et c'est un phénomène des campagnes et des petites villes.

Les comportements de formation (scolarisation ou apprentissage) peuvent varier avec la taille des villes, mais ce n'est pas un facteur suffisant pour fonder une classification, les correlations entre taille des villes, taux de scolarisation, taux d'apprentissage n'étant pas très fortes. Il faut tenter d'inclure dans l'analyse les caractères fonctionnels des villes et leur localisation spatiale : appartenance à une trame urbaine et inclusion dans un espace culturel.

Après avoir défini à partir de variables de scolarisation et d'apprentissage des "types de villes", il sera nécessaire de les replacer dans le cadre régional : il faudra alors chercher à identifier les régions se caractérisant par une relative homogénéité des comportements en matière de scolarité ou d'apprentissage, puis à savoir dans quelle mesure ces différenciations sont réductibles à des différences dans le degré d'urbanisation, le type d'activité dominant (agricole, non agricole), la composition sociale des unités considérées.

Dans le cas de la France, la différenciation dans la scolarisation et l'apprentissage selon la taille des villes semble assez faible, le comportement des jeunes urbains étant relativement homogène ; l'appartenance à une région est un facteur d'inégalité plus important. Les oppositions urbains/ruraux ; agricoles/non agricoles se superposent aux variations régionales accusant parfois, ou au contraire réduisant, les différences entre régions.

Pour approcher le problème des rapports entre inégalité due à des différences d'origine sociale et inégalité géographique, on peut essayer d'expliquer les disparités géographiques par des différences de composition sociale. Les deux phénomènes peuvent jouer concurremment. Si, dans le cas de la France, la variabilité géographique des taux est faible pour les cadres supérieurs et moyens, elle est forte pour les salariés agricoles, les ouvriers, les exploitants agricoles.(

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1) Etudes et Documents n° 11 1968 - Service Central des Statistiques - Ministère de l'Education nationale.
15 à 17 ans Salariés agricoles: 15,7 % en Meurthe et Moselle et 70,6 en Lozère.
Ouvriers : 24,8 % dans le Bas-Rhin et 73,8 en Lozère
Exploitants agricoles : 18,1 % en Vendée et 65,9 dans l'Hérault.

Pour une part, cette variabilité reflète l'hétérogénéité des catégories socio-professionnelles et la diversité de leur contenu. Mais ceci ne suffit pas à rendre compte de la dispersion des taux. Si certaines catégories échappent en grande partie à l'inégalité géographique, dans la majorité des cas elle superpose ses effets à ceux de l'inégalité sociale qu'elle compense ou aggrave.

Il semble qu'aucune des oppositions (petites villes/grandes villes, urbain/rural) ne provoque l'éclatement du cadre régional. Elles permettent seulement d'apporter des nuances. D'autre part, plutôt que d'opposer les deux phénomènes "appartenance sociale" et "appartenance géographique", il parait plus utile d'étudier leurs interactions.

Dans le cas de la France, lors d'une étude faite en 1969, l'examen cartographique des taux de scolarisation des jeunes de 16 ans a permis de distinguer trois ensembles :

- une aire de forte scolarisation - Sud
- une aire de faible scolarisation - Nord
- une aire d'apprentissage - Centre, Ouest et périphérie du Bassin parisien.

Ce phénomène régional permet de replacer les attitudes de formation. Dans le cadre d'un héritage,les comportements culturels font partie des données à rythme très lent d'évolution ; ils conduisent à s'attacher à l'étude des tendances régionales dans le long terme dans le contexte plus général des perspectives de débouchés et de carrières professionnelles.

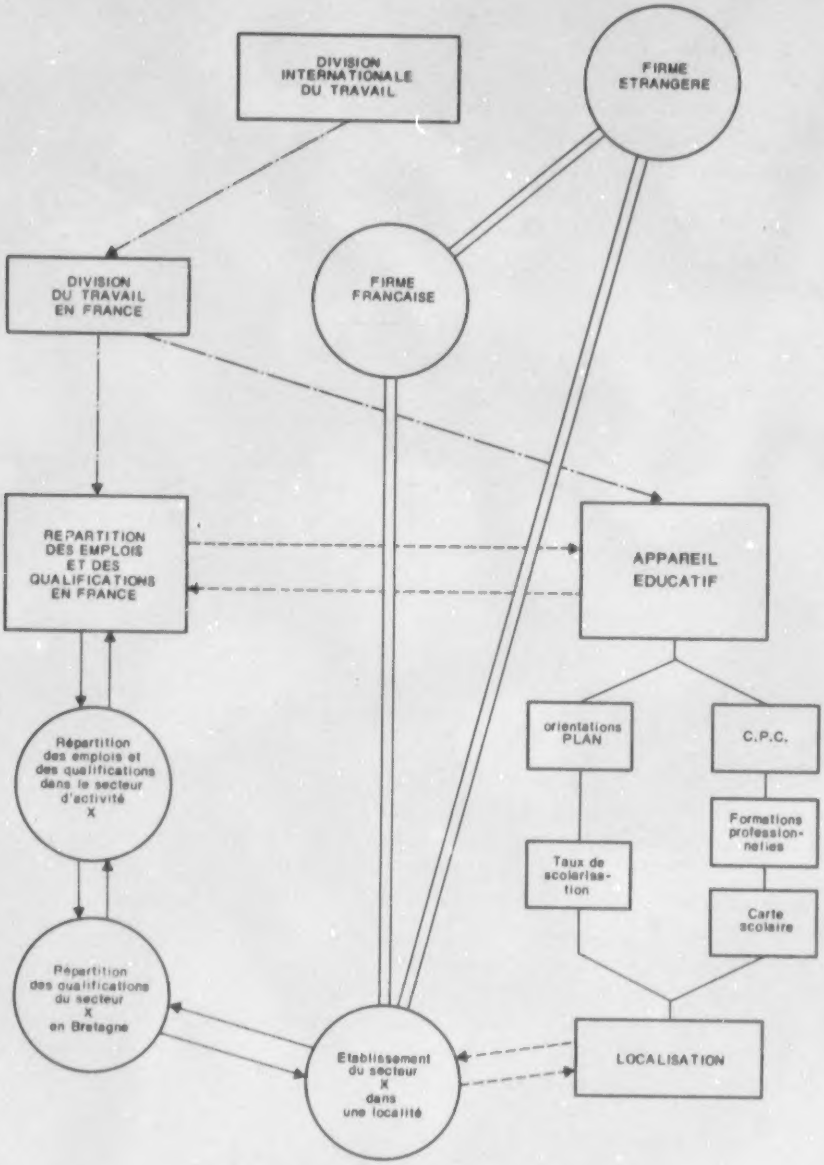
INTERACTIONS ENTRE APPAREIL PRODUCTIF ET APPAREIL DE FORMATION DANS L'ESPACE REGIONAL

Le schéma n° 2 ci-après illustre le contexte général dans lequel, pense-t-on, devrait s'orienter la réflexion pour saisir valablement les interactions entre appareil productif et appareil de formation au niveau régional. Comme on peut le constater, la division du travail est au coeur de la démarche proposée. Elle agit non seulement sur la sectorialisation des emplois et des structures de qualification, influant ainsi sur la structuration de l'espace économique régional, mais aussi sur la physionomie de l'appareil de formation.

La structuration de l'espace économique régional et son évolution est fonction du développement des entreprises régionales, et des implantations d'établissements effectuées dans la région par des entreprises extra-régionales.

La structuration des emplois dépend de l'état de la division du travail, considéré d'un point de vue général, la division étant fonction des conceptions de l'organisation du travail les plus propres à favoriser la productivité compte tenu d'un certain état de la technique.

Schéma 1 **DIVISION DU TRAVAIL APPAREIL EDUCATIF ET INTER-RELATIONS**


DIVISION INTERNATIONALE DU TRAVAIL
FIRME ETRANGERE
DIVISION DU TRAVAIL EN FRANCE
FIRME FRANCAISE
REPARTITION DES EMPLOIS ET DES QUALIFICATIONS EN FRANCE
APPAREIL EDUCATIF
orientations PLAN
C.P.C.
Répartition des emplois et des qualifications dans le secteur d'activité X
Formations professionnelles
Taux de scolarisation
Carte scolaire
Répartition des qualifications du secteur X en Bretagne
Etablissement du secteur X dans une localité
LOCALISATION

Au niveau d'une région, pour les entreprises (les extra-régionales) il est nécessaire de prendre en compte la dimension spatiale de la division du travail, les firmes pouvant fixer leur type de production, et donc les catégories d'emploi, en fonction de la main-d'oeuvre disponible (notamment des coûts de cette main-d'oeuvre).

L'exemple ci-dessous permet d'illustrer cette question de la division spatiale du travail.

Dans une entreprise automobile, dont le centre est situé à Paris, la proportion des ouvriers étaient :

en 1968	- pour l'ensemble des établissements	76,2 %
	- pour la région parisienne	69,8 %
	- pour les établissements de province, entre	86,9 et 91,5 %
en 1974	- pour l'ensemble des établissements	71,3 %
	- pour la région parisienne	60,8 %
	- pour les établissements de province, entre	81 et 89 %

En ce qui concerne l'évolution de la proportion des ouvriers spécialisés parmi les ouvriers :

en 1968	- pour l'ensemble des établissements	73,9 %
	- pour la région parisienne	68,1 %
	- pour les établissements de province, entre	78 et 92,8 %
en 1974	- pour l'ensemble des établissements	57,5 %
	- pour la région parisienne	60,2 %
	- pour les établissements de province, entre	62 et 83 %

Pour pouvoir bénéficier des avantages potentiels présentés par une région sur le plan de la main-d'oeuvre, il faut que l'établissement ait sur le marché du travail une position qui lui permette la mise en oeuvre de sa politique de recrutement.

La position de l'établissement sur le marché du travail tient à :

- ses caractéristiques propres : taille, taux de croissance, niveau des salaires, structure de qualifications ;
- son degré d'intégration avec les autres activités locales (exemple : laiterie et élevage) ;
- la nature de ses relations avec les autres établissements de la même branche : nombre des sous-traitants et activités données à l'extérieur.

Selon ses caractéristiques (taille, taux de croissance, niveau des salaires) l'établissement peut être ou non en situation de domination. Cette position peut être acquise par les relations que l'établissement possède avec les autres sur le plan de la production (sous-traitance) et du recrutement de la force de travail (utilisation de main-d'oeuvre temporaire, par exemple).

Ainsi un établissement, par l'importance de la main-d'oeuvre employée et s'il pratique des salaires un peu plus élevés que les autres, peut être dans une certaine mesure le maître du jeu sur le marché du travail. De ce fait, le fonctionnement du marché sera étroitement lié au dynamisme ou au statisme de cet établissement dominant.

Cela aura des effets directs ou indirects sur les établissements existants et sur la main-d'oeuvre disponible.

La position de l'établissement dans le marché du travail ainsi définie aura des conséquences sur les modes d'utilisation de la force de travail (politiques de recrutement). On devra donc s'attacher à identifier pour les grands établissements les types de main-d'oeuvre et de qualifications qui proviennent du marché externe (marché du travail) ou du marché interne (établissement lui-même).

Cette pratique d'embauche est d'autant plus indispensable à apprécier qu'elle conditionne le type d'insertion des jeunes au sortir de l'appareil éducatif.

Pour tenter de saisir concrètement la relation emploi-formation au-delà même d'appréciations trop exclusivement comptables, il est nécessaire de poser la question de la signification sociale des diverses composantes de l'appareil de formation public et privé, ainsi, tous les formateurs d'un même niveau s'adressent-ils au même public ou existe-t-il des différences entre :

- appareil de formation scolaire et apprentissage
- enseignement général et technique
- organismes de formation à but lucratif et autres.

L'étude comparée de l'appartenance sociale des différentes categories doit être conduite à une échelle géographique fine, l'orientation pouvant se définir par rapport aux modèles locaux de réussite, d'où l'intérêt de s'interroger sur la nature et les composantes socio-économiques de ces modèles. On est alors amené à poser la question de la signification réelle des formations acquises. Comment permettent-elles d'accéder au marché du travail? Y-a-t-il valorisation sur place des diplômes? Est-elle possible dans tous les métiers? Que représente la formation acquise lorsqu'elle ne débouche pas sur le marché du travail local?

La mobilité géographique est-elle facilitée par le niveau de qualification? Impose-t-elle au contraire un changement complet d'orientation professionnelle?

Annexe 1

NOMENCLATURE NATIONALE DES FORMATIONS EN 47 GROUPES

01 - Agriculture, élevage, forêts.
02 - Pêche, navigation maritime et fluviale.
03 - Mines et carrières (extraction), travail des pierres.
04 - Génie civil, travaux publics, topographie.
05 - Construction en bâtiment.
06 - Couverture, plomberie, chauffage.
07 - Peinture en bâtiment, peinture industrielle.
08 - Production et première transformation des métaux : fonderie, laminage, moulage.
09 - Forge, chaudronnerie, construction métallique, formations connexes.
10 - Mécanique générale et de précision, travail sur machines-outils, automatismes.
11 - Electricité, électrotechnique, électromécanique.
12 - Electronique.
13 - Verre et céramique.
14 - Photographie, industries graphiques (photogravure, composition, impression, etc.).
15 - Papier et carton (fabrication, transformation, brochage, reliure).
16 - Chimie, physique, biochimie, biologie, production chimique.
17 - Boulangerie, pâtisserie.
18 - Abattage, travail des viandes.
19 - Autres spécialités de l'alimentation (transformation - préparation).
20 - Textiles : peignage, filature, tissage, bonneterie, textiles artificiels et synthétiques, apprêts, blanchiment, teinture.
21 - Habillement, travail des étoffes : coupe, couture, broderie, lingerie, confection de vêtements, fourrure, chapellerie, tapisserie, matelasserie.
22 - Travail des cuirs et peaux : tannerie, mégisserie, pelleterie, corroierie, cordonnerie, sellerie, maroquinerie, fabrication industrielle de la chaussure.
23 - Travail du bois : scierie, menuiserie, ébénisterie, charronnage, tonnellerie, autres spécialités du travail du bois.
24 - Conducteurs d'engins terrestres : engins de chantier, de levage, de transport et machines agricoles.
25 - Autres formations des secteurs primaire et secondaire (conducteur de fours, de chaudières, manutention).
26 - Dessinateurs du bâtiment et des travaux publics.
27 - Dessinateurs industriels.

28 - Organisation du travail, gestion et contrôle de la production.
29 - Techniques administratives ou juridiques appliquées.
30 - Secrétariat, dactylographie, sténographie.
31 - Techniques financières ou comptables, mécanographie.
32 - Traitement électromécanique et électronique de l'information.
33 - Commerce et distribution.
34 - Information, documentation, relations publiques.
35 - Enseignement, animation à caractère éducatif.
36 - Arts et arts appliqués, esthétique industrielle.
37 - Santé, secteur paramédical, services sociaux.
38 - Soins personnels.
39 - Services dans l'hôtellerie et les collectivités.
40 - Arts ménagers.
41 - Surveillance, sécurité.
42 - Formations aux fonctions d'encadrement.
43 - Formations littéraires et linguistiques.
44 - Formations économiques, commerciales, juridiques, générales ou en gestion des collectivités publiques ou des entreprises.
45 - Formations générales en sciences ou en techniques industrielles.
46 - Préformations - formations générales à finalité professionnelle.
47 - Autres formations non regroupées ci-dessus.

Annexe 2

NOMENCLATURE DES NIVEAUX DE FORMATION

Niveaux	Définitions
I & II	Personnel occupant des emplois exigeant normalement une formation de niveau égal ou supérieur à celui de la licence ou des écoles d'ingénieurs.
III	Personnel occupant des emplois exigeant normalement une formation du niveau du Brevet de technicien supérieur ou du Diplôme des instituts universitaires de technologie, et de fin de premier cycle de l'enseignement supérieur.
IV	Personnel occupant des emplois de maîtrise ou possédant une qualification d'un niveau équivalent à celui du baccalauréat technique ou de technicien, et du brevet de technicien.
V	Personnel occupant des emplois exigeant normalement un niveau de formation équivalent à celui du Brevet d'études professionnelles (BEP) et du Certificat d'aptitude professionnelle (CAP).
V bis	Personnel occupant des emplois supposant une formation courte d'une durée maximum d'un an, conduisant notamment au Certificat d'éducation professionnelle ou à toute autre attestation de même nature.
VI	Personnel occupant des emplois n'exigeant pas de formation allant au-delà de la fin de la scolarité obligatoire.

CODE DPJ EN 9 POSTES

1. métiers de type "primaire" tous niveaux de formation confondus.
2. métiers de type "secondaire" niveau I et II.
3. métiers de type "secondaire" niveau III + IV.
4. métiers de type "secondaire" niveau V.
5. métiers de type "secondaire" niveau VI.
6. métiers de type "tertiaire" niveau I et II.
7. métiers de type "tertiaire" niveau III + IV.
8. métiers de type "tertiaire" niveau V.
9. métiers de type "tertiaire" niveau VI.

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Summary of Technical Report No. 7

THE RELATIONSHIP BETWEEN EMPLOYMENT AND TRAINING AT THE REGIONAL LEVEL IN FRANCE

by

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In France, which is traditionally a centralised country, socio-economic regional concerns have only been making themselves felt for about twenty years. They are the result of an accelerated policy of industrialisation which led to a geographical redistribution of economic activity. Education remained isolated from this movement until 1963 when the Ministry of Education drew up its "school map". This involved providing a given population with a network of training better adapted to local needs. In the beginning, this adaptation was strongly influenced by the analytical methods used in national planning.

This report deals with three questions: the evaluation of training needs at the regional level; the significance of the relationship between employment and training; and the integration of employment and training at the regional level.

EVALUATION OF TRAINING NEEDS AT THE REGIONAL LEVEL

Two methods were used: a diagnosis made within a framework of planning and a statistical analysis, which attempts to quantify and compare regional developments.

1. Diagnosis within the planning framework

Here again two methods were used: on the one hand, a forecast of training needs in the Mediterranean region (Provence - Côte d'Azur and Languedoc-Roussillon); on the other, an examination of training and employment at regional level within the framework of the 7th French Plan.

a) Forecasts for the Mediterranean region
This is a not very industrialised region. Its development dates from the setting up of the industrial complex of Fos-Etang de Berre. Unfortunately, the methods used were the same as those for national forecasts, which are oriented towards large scale macro-economic balances. However, the main interest lay in the attempt to transform employment needs into training ones. Employment needs, which were defined by forecasts of employment stocks by level of qualification and by sector, were set against the expected flows from technological education at different levels broken down into 47 groups. The assumption that imbalances may be corrected simply by permanent education is no longer valid. An attempt was therefore made to understand the real mechanisms of job access and recruitment practices. It was thus possible to construct, for various sectors of activity, indicators of geographical and professional mobility and to make certain recommendations about the compensatory education necessary.

b) Examination of employment and training at regional level
The regional dimension of the links between employment and training appears for the first time in the 7th Plan. However, the planners' approach is not regional development as such but rather the definition of regional constraints which are the outcome of the centrally-defined policy. A past time-period (1968-73) is compared with a future period (1976-81). The setting of recruitment needs against the flows from training institutions is the basis of regional schedules drawn up according to qualifications. Having described the methodology, the report goes on to note that there are regional differences in the problem of "de-qualification". Since almost identical imbalances are to be found in very different regions, it was decided to go beyond the purely statistical approach, which although it reveals quantitative imbalances does not identify their origins. Regional differences are in fact the result of a range of characteristics which can be grouped into a certain number of indicators: the economic fabric (structure by sector and branch); the employment structure; the unemployment rate; and flows from the education system. Factors which might influence the imbalances are listed. As far as employment needs are concerned, those to be noted are occupational mobility (although the 7th Plan considers it to be the same in all regions), qualitative changes (due to improved working conditions and the structure of new industrial plants) and lastly migration and all it implies. In terms of training, the methods of entry into working life, which vary from region to region and the potential

competition between unemployed persons and new entrants as well as between workers trained on the jobs and school leavers mean that it is essential to analyse the interdependence between the education system and the production system.

As a whole, the report stresses the inadequacy of the methods used. This inadequacy stems from the theoretical nature of the assumptions (a rigid vocational structure, optimal product mixes, automatic replacement in the labour market, the inter-relationship between employment and training).

2. Statistical Analysis

The inter-regional approach is an attempt to identify and interpret differences, to analyse their meaning in the past and to forecast their developments. The method is based on a study of regional structures, defined on the basis of a certain number of indicators which underline inter- and intra-regional disparities. This methodology is approved of in the report, which emphasizes the danger of extrapolating too freely because certain indicators are very tenuous, the economic context changes over time and the strategy of firms has a considerable influence. Until recently, this method was applied particularly to the movement of people (occupational mobility and migration) and it was not until 1974 that a study of economic factors introduced into the methodology a notion of movement among firms (setting up and closing down of firms and therefore of jobs).

UNDERSTANDING THE TRAINING-EMPLOYMENT RELATIONSHIP

Some studies have analysed the relationship.

1. Occupational and geographical mobility

One study describes the importance of movements of the working population in the functioning of the labour market. There are two kinds of movements: first sectoral or regional movements, which are a response to offers of employment and second the movement (up or down) from one occupational category to another. Research has shown that those without diplomas and those with a secondary vocational diploma are the most mobile. Holders of general secondary diplomas and those with third level degrees are not particularly mobile. For less than half of the numbers involved, this mobility reflects a change of firm and for only 15 per cent a change of region. The least qualified, who are the most mobile, also emigrate the least; for those having reached higher educational levels, mobility more often involves geographical movement.

2. Access to industrial employment and the effects of regional development

A study on this subject goes beyond the mere quantification of training needs. It attempts to analyse the functioning of the labour market in terms of the industrial picture. It also analyses the regional labour markets as well as production techniques and societal relationships in industrial units. The perspective is not therefore that of individual demand but of the behaviour of collective units. The study concludes that there is intra-sectoral heterogeneity alongside inter-sectoral similarities; and a significant absence of correlation between training and employment. The study echoes the segmentation of labour market theories.

3. Information about the labour market available to vocational education decision-makers

This information cannot be provided through a global approach which does not take account of the genuine market fragmentation. An empirical methodology led to the proposal of a certain number of indicators: risks of a surplus or a scarcity of qualifications; choice of training; structures. The report summarises in tabular form the results obtained in the small number of cases studied by this method.

INTEGRATION OF REGIONAL SYSTEMS OF EMPLOYMENT AND TRAINING

Analyses have already shown the limitations of isolated approaches in this area. In other cases, although the relationship between education and employment has been studied, the space dimension has not been integrated with it. The report takes up some proposals from a number of French studies.

Some of these studies deal with the "deformation of the industrial fabric in France" between 1961 and 1970. This deformation was above all the result of the development of new plants and it was the large ones (100 or more employees) which created the largest amount of industrial employment during this period (92 per cent of the total). At this time, four sectors (the automobile industry, electrical industry, mechanical industries, chemical and rubber industries) provided two thirds of the employment made available. Decisions to set up plants were influenced above all by lack of space, help from public authorities and availability of manpower. This was also a period of industrial growth and land development which seemed to follow the same trend. The report looks at the regional impact of this creation of industrial employment, but it cannot at this stage take account of all their side effects, notably on employment in the tertiary sector.

The geographical diversity of economic situations means that a quantitative and qualitative analysis of training and apprenticeship is necessary for education. The report indicates the causes of these disparities (size of towns, the administrative division, rural or urban environment, socio-economic composition, sex, enrolment rates).

The regional structure of employment and the training which could be related to it are analysed in the light of forecasts of work distribution, the development of existing enterprises and the introduction of extra-regional activities. The report lists the variables needed to understand the position of a firm on the labour market (size, rate of growth, salary level, structure of qualifications, degree of integration with other regional activities, relationships with the rest of the industry) and the recruitment practices which result from this. On the educational side, the report proposes a comparative study of the socio-economic composition of different kinds of training and of the real significance of this composition.

Part Three

REGIONAL DISPARITIES IN EDUCATION

Troisième Partie

LES DISPARITIES REGIONALES EN MATIERE D'EDUCATION

Technical Report No. 8

REGIONAL EFFECTS OF SWEDISH EDUCATIONAL PLANNING

by

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I. A THUMBNAIL SKETCH OF SWEDEN

Seen in a European perspective, Sweden is a large country with a small population. Moreover, there are great regional variations in population density. The greater part of the population is to be found in a few metropolitan regions, while large areas of northern and western Sweden are thinly populated.

During the present century, Sweden has undergone a radical process of transformation from agrarian to urban society. The shift in economic emphasis has been accompanied by similar changes in the geographical distribution of the population. Urban communities have grown rapidly and the countryside has lost population. There are great regional variations in this pattern, however, the most important of them being the heavy depopulation of the northern part of the country, which was already thinly inhabited before this process began. This development has helped to intensify the regional differences in Sweden.

Sweden has a highly-developed economy and ranks as one of the leading industrial nations of the world. Demands for greater competitive strength and efficiency have led to structural changes in the Swedish economy. These changes are closely bound up with spatial problems and have affected the national infrastructure.

Table 1

DISTRIBUTION OF THE POPULATION BY TRADE AND OCCUPATION DURING THE 20TH CENTURY

Occupational sector	1900 %	1930 %	1960 %	1970 %
Agriculture and forestry	51.1	35.0	13.9	7.6
Industry and building	29.0	35.0	42.0	40.4
Commercial services	13.5	23.7	31.5	31.9
Social services	6.4	6.3	12.6	20.1
Total	100.0	100.0	100.0	100.0

Source: Swedish Occupational Statistics.

The regional imbalance between demographic and economic development has attracted increasing attention in recent years. The causes and consequences of the ongoing process of structural change have been thoroughly investigated in the context of continuous social planning.

II. SOCIAL PLANNING

> "The manifold activities of society are divided into various branches or sectors - e.g. education, medical services, housing construction, roads, defence - each sector having its own administration and specific aims in its activities. The allocation of responsibility between the political bodies in the community displays much the same pattern.
>
> "In each sector of society, various authorities are responsible for planning in accordance with the guidelines laid down by the Government and Riksdag. Development plans, sometimes in the form of special investigation reports, provide the foundation on which authorities base their budget estimates for coming years. These annual estimates are the point of departure for the Government and Riksdag when the balance between the desires of the various sectors is struck in the Budget. The authority within each sector is then responsible for the way in which work is conducted within the contexts determined by Government and Riksdag."(1)

Planning and implementation within each branch of activity come under what is customarily termed sectoral planning. But the results of planning also have consequences at regional level and in other sectors and are at the same time determined by the scope afforded by the aggregate economy of the country. To cope with these problems, master planning, which situates sectoral planning in physical and economic realities, is needed.

In principle, the Government is responsible for all master planning at national level, though certain questions come under the jurisdiction of the Riksdag. In reality this master planning implies central decisions of policy in the form of balances between different sectors and between different geographical areas. An individual

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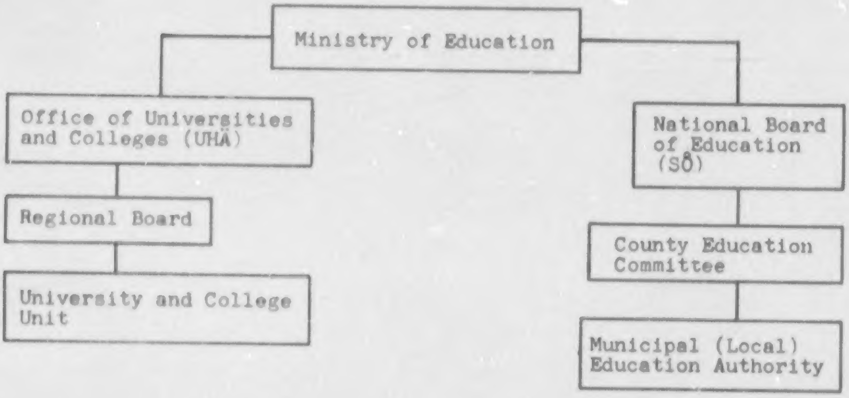
1) Source: Samhällsplanering i Sverige.

administrative authority cannot strike balances of this kind, and the ultimate political responsibility can only be assumed by the Government and Riksdag.

Social planning in Sweden is mainly divided into three levels: national, county and municipal (local). These levels are intended to reflect the problems and responsibilities regarded as national, county and municipal concerns respectively. In order to obtain some idea of the Swedish administrative system, and with it of the routes followed by planning activities, we will follow one sector - the education sector - from one level to another.

Figure 1

PLANNING LEVELS IN THE EDUCATION SECTOR


Ministry of Education
Office of Universities and Colleges (UHÄ)
Regional Board
University and College Unit
National Board of Education (SÖ)
County Education Committee
Municipal (Local) Education Authority

The guidelines for all education at national level are laid down by the Ministry of Education together with the National Board of Education (SÖ) and the Office of Universities and Colleges (UHÄ), the two administrative boards. Planning at regional level is the responsibility of State authorities - the County Education Committee and the Regional Board.

The county education committees are responsible for the planning of elementary and upper secondary education in the 24 counties. The regional boards (6 in number) are responsible for the master planning of higher education in their respective educational regions. Local educational planning within a municipality is the responsibility of a municipal (local) education authority.

Development forecasts and business expectations with reference to various sectors of society are summarised at national level in the so-called long-term surveys. These surveys also set the framework for the planning of regional policy, because they are the foundation on which a great deal of regional economic assessment is based.

The documentation used for national physical planning mainly comprises special inventories giving sectoral or area descriptions of demands on land and water resources. Certain parts of this planning are also based on the assessments and assumptions made in the long-term surveys and in the planning of regional policy.

Apart from certain differences of chronological perspective, the three forms of planning also refer to different spheres of interest. The long-term surveys furnish documentation for more long-term assessments of fiscal economic development, while regional planning is above all concerned with the distribution of population, job opportunities and services. Another important part of this planning concerns the development of conurbations, and in this respect it forms the basis of physical planning.

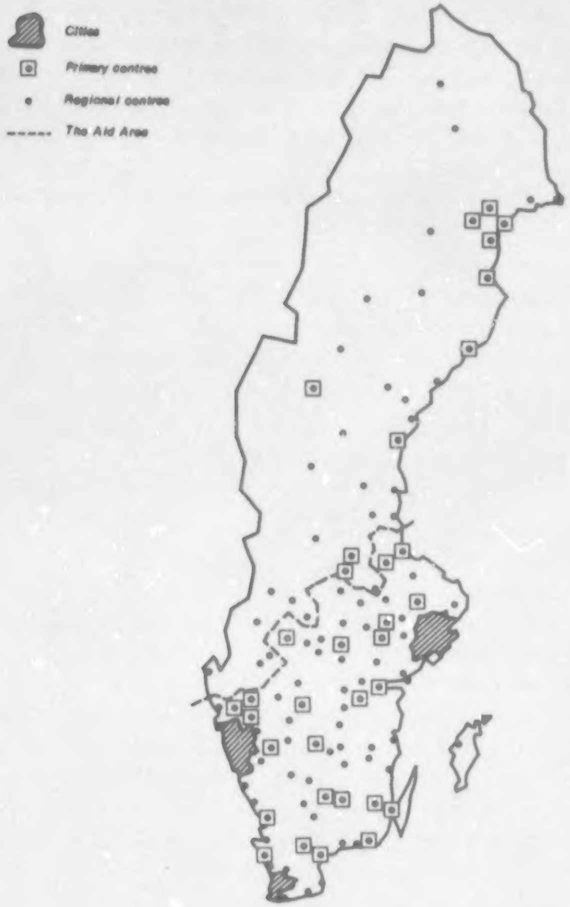
National physical planning is above all concerned with the use of land and water outside the urban regions. This planning is germane to regional planning in that it identifies physical impediments and potentialities surrounding the development of the conurbations.

The development of the planning conducted during the latter half of the 1960s and the early 1970s - County Planning 1967, County Programmes 1970 and 1974, Regional Transport Planning and Land and Water Management - served to identify and chart the present urban settlement system and regional structure. (Figure 2.)

This work led to the classification of urban settlements adopted by the Riksdag in 1972. Developments to date are mainly a result of the siting preferences of the three sectors - enterprise, households and the public sector - and their interaction. The classification of urban settlements can be seen as the first phase of a policy of regional planning consisting of two phases. The first of these concerns the indication of the form of the urban settlement system, while the second entails the framing of measures to guide the development of urban settlements in a desirable direction.

We can sum up by saying that the urban settlement system which has now been created has acquired great importance in connection with the amplification of regional policy. It leads to what is termed an urban settlement system policy, which means that the activities of the public sector are divided between different levels of the urban settlement system. Also, the rest of the economy can be directed to the various parts of the urban settlement system in a more active manner.

Figure 2. THE PLAN FOR THE REGIONAL URBAN SETTLEMENT STRUCTURE


Cities
Primary centres
Regional centres
The Aid Area

Source : Samhällsplaneringen i Sverige.

Source: Samhällsplaneringen i Sverige.

III. THE EDUCATIONAL SECTOR - MEANS AND ENDS

"Education and society influence one another. Education, moreover, is one of the means whereby the long-term development of society can be actively influenced."(1)

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1) Mål för högre utbildning, a debate book published by the U68 Commission.

Although they are diffuse and often contradictory, general goals of policy such as liberty, equality and solidarity and economic prosperity do in principle determine the answers to questions concerning how large a portion of the combined resources of society should be invested in education and how that portion should be allocated among the members of society.

A statement of the overriding goals of the education system is given in Section 1 of the Education Act.

> "The aim of the instruction provided for children and young persons by the community is to impart knowledge, to develop the pupils' skills and, in partnership with their homes, to foster their development into happy individuals and competent and responsible members of society."

A somewhat more specific enumeration of goal components is suggested in the book "Mal för högre utbildning" published by the U68 Commission. This comprises a positive evaluation of the following:

i) Personal development
ii) Communicative ability
iii) Special preparations
iv) A common frame of reference
v) (Good) study and working habits
vi) The right to education.

These goals are primarily connected with the function of the education system in providing for needs which the individual is presumed to have - individually oriented aims, in other words.

The main tasks of the current reform of higher education were defined in the following terms by the Minister of Education when the Government Bill (1975:9) was moved in the Riksdag:

> "to improve further the accessibility of education, especially to groups of students other than the traditional ones, and thereby to contribute towards the process of social equalisation;
> "to broaden and differentiate the total educational repertoire, especially with regard to the relationship between education and the labour market and the reform of working life;
> "to democratise the organisation of education and to adjust forms of activity in education to a more variegated structure of student recruitment."

These goals focus more directly on:

- the ability of the education system to perform certain functions in present-day society (socially-adjusted aims);
- and the ability of education policy to help open the way to new functions which are more sensitive to social conditions.

What, for example, is the meaning of a goal such as "the right to education"?

> "Human equality is one of the fundamental aims of Swedish society. The demand for equality leads to the demand for equal educational rights, although this can be interpreted in various ways."
>
> "If by equal rights to education we mean the right to education with equivalent ultimate aims, this can be taken to mean that the ultimate aim leads to equivalent job opportunities. If on the other hand equal rights to education denote the right to develop one's innate aptitudes, the right to interpret one's potentialities should of course be vested in the individual. Thus the principle of equal rights to education does not have a clear enough content to form the foundation of educational planning. It has to be seen against the total impact of education on society."(1)

What are the implications of equal educational rights in a regional perspective? Distance is a barrier to the individual wishing to avail himself of an educational opportunity. The accessibility of education can be partly enhanced by a further spread of amenities. Often, however, this cannot be accomplished without further educational specialisation by the various educational areas, which conflicts, for example, with the view that equal educational rights imply the right to equivalent educational alternatives (in one's home area). Both accessibility and diversity can be justified on grounds of equality. Considerations of the needs of the market and of the short-term demand of individuals (usefulness or benefit) often point in favour of a readily-accessible, decentralised but locally-specialised organisation.

One of the major problems connected with the external organisation of education, therefore, is to define and arrange in order of priority fair allocation, equal access, the needs of the labour market and student preferences. The other factors come to the fore where the true purpose - the internal organisation of education - is concerned.

The other goals recede into the background during discussions of external organisation and location because they are less susceptible to influence via localisation, for example - and not because they are less important.

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1) U68, Mål för högre utbildning.

IV. THE REGIONAL ORGANISATION AND SCOPE OF EDUCATION

The Swedish education system has undergone great changes in recent years, and many thoroughgoing reforms have been enacted in the school sector. The most thoroughgoing of all were the Riksdag Resolution of 1962 introducing the compulsory nine-year comprehensive elementary school and the Resolution taken in 1968 whereby continuation school, gymnasium and vocational school were superseded by an integrated upper secondary school, inaugurated in the autumn of 1971.

Higher education has expanded a great deal, and university and other post-secondary studies have been introduced in a succession of new places. The new scheme of higher education which became operative on 1st July, 1977 implies greater access to higher education, a close interrelationship of education and working life, and new forms of activity. In other fields of adult education too, participation has steadily increased, and the special scheme of labour market training is an important supplement to other forms of public education.

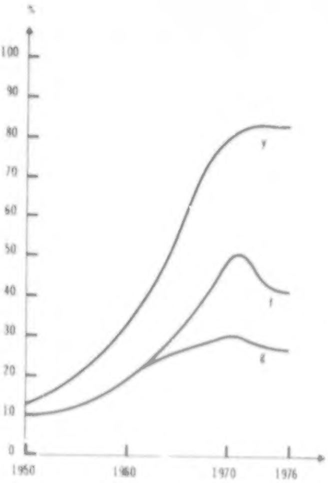
Elementary school

The introduction of the nine-year compulsory and comprehensive elementary school was preceded by a relatively long period of planning and experimentation. Consequently the organisational structure of the new elementary school was fairly well rooted by 1962, which meant among other things that elementary schools incorporating the three terminal grades were fairly well distributed throughout the country. During the 1960s, in connection with the municipal boundary reforms of the period, elementary school catchment areas were altered to coincide with the new municipalities. In this way the function of the individual school came to be viewed in the same context as other municipal amenities and, consequently, together with the general process of social planning at municipal level. The municipal authorities are the principals of the new elementary school system, which was fully established by school year 1972/73.

The external organisation of elementary school is determined by decisions concerning catchment areas and school units. Catchment-area boundaries delineate the area for the children of which the municipality has to organise education. Elementary schooling in a municipality can be organised into one or more school units, but a special plan of organisation has to be drawn up stating which units are to be maintained. This plan is drawn up and adopted by the municipality.

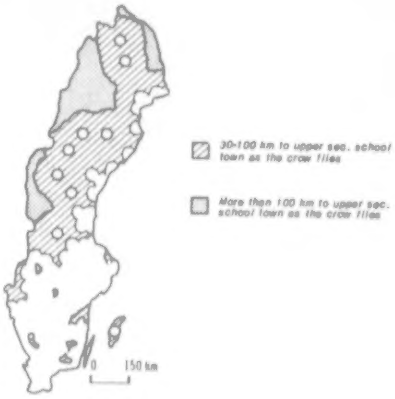
The quantitative standard applied to the planning of senior level elementary schooling (i.e. the three terminal grades) has been a minimum of 180 pupils. At the same time, however, evaluations have been made of the special situation of the inhabitants of sparsely populated areas, and various organisational solutions have made it possible for senior level classes with smaller numbers of pupils to be maintained in sparsely populated areas. Only the most sparsely populated areas of all in the north of Sweden lack senior level schools. In areas of this kind, pupils sometimes have to travel a long way (no less than 30 km) to and from school every day, or else they have to live in boarding homes during the week.

Figure 3. GYMNASIUM, CONTINUATION SCHOOL AND VOCATIONAL SCHOOL ENTRANTS AS PERCENTAGE OF THE AGE GROUP EACH YEAR



Source / Swedish occupationel statistics

Figure 4. ACCESS TO UPPER SECONDARY SCHOOLING WITHIN 30 AND 100 KM RADIUS


30-100 km to upper sec. school town as the crow flies
More than 100 km to upper sec. school town as the crow flies
0
150 km

Source / Dsln 1972:1

By reason of its distribution throughout the country, elementary school is one of the most important basic services in the community. Thus senior level schools at present exist in some 500 different localities. This diffusion helps to make it possible for satisfactory elementary education to be offered in all parts of the country.

Upper secondary school

The present upper secondary school represents a merger of the previous troïka of continuation school, gymnasium and vocational school. The various upper secondary study routes are co-ordinated as closely as possible with regard to aims, organisation and working methods. Most lines are broadly based to begin with and then narrow down successively towards particular occupations or further studies.

Upper secondary schools are sponsored by the municipalities. A municipality unable to run its own upper secondary school will cooperate with another (sponsoring) municipality. The localisation and dimensioning of upper secondary school amenities, on the other hand, are decided by the National Board of Education (SÖ). A catchment area has to be defined for every study route in upper secondary school.

The 1960s saw a substantial quantitative expansion of upper secondary schooling, and eventually it will be possible for practically all young persons in Sweden to continue studying after they leave elementary school. At present there are some 125 communities with upper secondary school amenities.

Higher education

The reforms of elementary and upper secondary schooling have now been followed up by a reform making higher education open to new groups of citizens. Entrance requirements and opportunities have been changed, and the content, organisation and localisation of higher education are now being replanned with new purposes in mind. Attention has come to focus on the distribution of higher education amenities between social groups, regions and educational routes so as to cater for the educational requirements of the individual and of working life.

The new system of higher education embraces a good deal more than the former universities and colleges, and the latest reform can be characterised by the following attributes: higher education is now a) broader, b) research-related, c) democratic and d) decentralised. Basic higher education is taken to include not only education following on from upper secondary school but also education which, seen from the viewpoint of the student or the labour market, is an alternative to post-secondary education even if at present it is based formally on elementary schooling only. Education of the latter kind includes nursing education and the training of pre-school teachers, for example.

Figure 5. **HIGHER EDUCATION REGIONS**

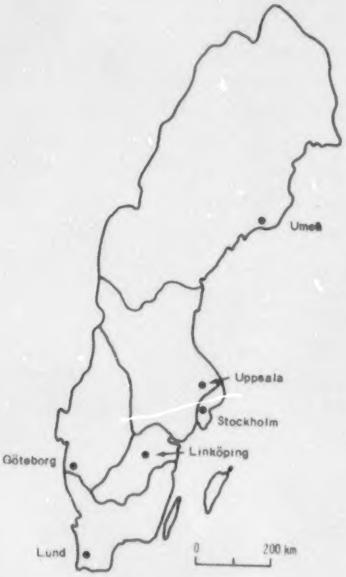
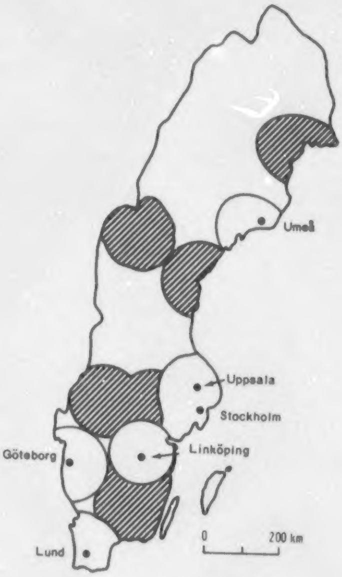

Umeå
Uppsala
Stockholm
Linköping
Göteborg
Lund
0
200 km

Figure 6. **HIGHER EDUCATION OPPORTUNITIES (HIGHER EDUCATION CENTRES) WITHIN 100 KM RADIUS**


Umeå
Uppsala
Stockholm
Linköping
Göteborg
Lund
0
200 km

Source : Government Bill 1975 : 9.

As from 1st July, 1977, higher education in Sweden will be organised in six educational regions. The present university towns will become centres of their various regions. The purpose of the new regional division is for each region to have extensive powers of discretion in its educational planning and in designing the content, localisation and dimensioning of educational opportunities. Each region will include several higher education centres presenting a variety of educational opportunities. The regional division does not mean that a person living in a particular region is prevented from studying elsewhere.

Labour market training

The purpose of labour market policy in Sweden is to promote full production and freely-chosen employment. This aspiration is justified by various considerations of social and income-allocation policy. Its social role is to remove obstacles to individual adjustment to the current state of the labour market and also to give the individual a wider choice of employment opportunities. To meet these objectives, an extensive training organisation is needed which can provide the labour force with basic or subsequent training.

Labour market training has been established with the aim of offsetting cyclical and structural changes in the economy. People losing their jobs as a result of closures or rationalisation are retrained under this scheme to qualify for employment in other sectors. Labour-market training is not solely designed for redundant workers, however. It also caters for handicapped persons and housewives who wish to obtain employment in the open labour market and require vocational training in order to be able to do so. Labour market training is jointly conducted by the National Board of Education (SÖ) and the National Labour Market Board (AMS). Training courses are organised in about 50 places and involve upwards of 40,000 trainees.

V. THE REGIONAL EFFECTS OF EDUCATION

To what extent has educational planning achieved its ends? Some of the effects achieved will now be considered in relation to the goals which have been defined. Only examples shedding light on the regional effects of external educational planning will be dealt with. For example, how has recruitment to different forms of education been affected by changes of dimension, location and entrance requirements? And what further implications have recruitment changes had for the individual and society?

The education policy which has been followed in Sweden is characterised by efforts to improve the accessibility of education to all and thereby to improve the prospects of social equalisation. The introduction of the nine-year elementary school was a manifestation of these aspirations, and the reform of upper secondary schooling has served the same purpose. It is of course fundamentally important to higher educational recruitment for the lower educational levels to have a breadth and organisation making it possible for the objectives that have been defined to be actually achieved. The process of selection eventually resulting in an individual person enrolling at university or college or taking part in other forms of higher education already begins with the decisions which pupils make at the senior level of elementary school and then later on when they come to choose between upper secondary education and immediate gainful employment.

A regional and temporal distribution of educational recruitment, both totally and with reference to different groups, can for example be used to indicate the fulfilment of such aims as:

> "to further increase the accessibility of education, particularly to groups of students other than the traditional ones, thereby furthering the process of social equalisation."(1)

Education is here regarded exclusively as a component of individual welfare. What organisational solutions are required in order to recruit "other groups of students besides the traditional ones" (elderly persons, women, married persons, people from working class families, people without the normal academic background, etc.)? How important is distance, for example, and to what extent is recruitment influenced by a more widely-distributed educational organisation? To what extent and where can a manifest demand for education be rather the substitute for essential local components of welfare (e.g. employment) than the expression of a "genuine" need?

The next section shows how total demand for education is influenced by the localisation and scale of educational amenities; this is done by quoting examples from higher education and upper secondary school.

The rough measurement provided by total demand in various groups implies that all forms and types of education are equally beneficial to all sorts and conditions of persons. But educational content is no less essential than scale in the evaluation of educational opportunities. The temporal and regional distribution of recruitment within various types of education gives some indication of the extent to which the following purpose has been attained:

> "to broaden and differentiate the total educational repertoire, especially with regard to the relation between education and the labour market and the reform of working life".(1)

Education here is partly regarded as an individual welfare component, since not just any kind of education or education in general but special (freely-chosen) education is to be made available to as many people as possible. But the relation to the labour market and "the reform of working life" can also be justified on other grounds, e.g. the fact that industry and commerce are in need of people with

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1) Government Bill 1975:9.

certain qualifications in certain regions in order to be able to function and develop efficiently. The conflict between the desire for proximity to education, leading to a scattered but specialised (and possibly labour-market-adjusted) localisation pattern, and the desire for a variegated and differentiated but more concentrated repertoire of opportunities, leading to a less restricted range of educational options, is dealt with in section 2. How is the distribution of demand between different types of education affected by the composition and localisation of opportunities?

The individual's choice of education is also interesting in a regional perspective because it has a bearing on his subsequent activities after education. To what extent do students obtain work in their home areas that corresponds to their education? How many of them have to migrate? To what extent is the local educational profile adjusted (or to what extent should it be adjusted) to the local labour market? To how many people is it more important to obtain a job - any kind of job - near home than to obtain the type of job they desire but at the cost of migration? How significant are opportunities of recurrent education and which people make use of them? These questions will be illustrated by examples in section 3.

What are the direct and indirect effects of a certain educational set-up on the region where it is provided? How is the local labour market affected? How many people acquire employment in the region, directly or indirectly, as a result of educational activities? Has it been possible to observe any external growth-pool effects stemming from major educational localisations? These questions will be discussed in section 4.

1. TOTAL DEMAND FOR EDUCATION

The 1950s and 1960s were a period of rapid expansion in Swedish education. This was accompanied by rapid regional expansion, especially during the late 1960s. In upper secondary education, the 1970s have been characterised by a stagnation and re-orientation of total educational demand. Demand is still high, amounting to some 90 per cent of each age group, but there is a distinct shift in progress towards practical and vocational courses of study in upper secondary school. For universities and colleges, the opening years of the 1970s brought a distinct falling off of total educational demand. Variations in total educational demand have been slight during the past year or two but have hinted at a slight upward turn again.

During the period of expansion between the 1950s and 1960s, the number of educational centres increased in both upper secondary and higher education. Figure 4 shows upper secondary school coverage

Table 2

DEMAND FOR UPPER SECONDARY AND POST-SECONDARY EDUCATION

Type of education	1962/63	1968/69	1971/72	1972/73	1974/75	1975/76
Upper Sec. Theoretical streams (1)	n.a.	n.a.	58,921	51,040	46,669	43,720
Upper Sec. Practical streams (1)	n.a.	n.a.	35,437	43,465	49,700	48,457
Higher education (2)	10,745	31,218	23,392	22,816	23,920	26,893
Labour market training (3)	20,747	68,768	94,423	101,325	88,869	n.a.
Number of 16-year-olds	129,596	108,946	108,113	108,562	105,864	105,853

1) Qualified applicants (first preference), autumn term.

2) Students enrolling at universities and colleges for the first time.

3) Total number of participants.

Source: Swedish Occupational Statistics.

in 1971 and at the same time provides a description of the high accessibility of upper-secondary education in Sweden. This allocation pattern has remained very much the same ever since the early 1960s. Figures 5 and 6 show the location and distribution of higher education according to the Riksdag Resolution of 1975. They also bear witness to a high level of accessibility. At the beginning of the 1950s, university and other higher education amenities were only available in four places (Uppsala, Lund, Stockholm and Göteborg). Today they are available in about twenty places.

The expansion of the 1950s and 1960s can most simply be put down to organisational changes in the education system combined with the growth of the relevant age groups and a continuing high degree of confidence in the employment value of higher education.

Both the 1962 elementary school reform and the upper secondary school reforms of 1964 and 1968 helped to raise demand for upper secondary and higher education. In the meantime, the number of young persons aged between 15 and 24 rose from 880,000 in 1955 to 1,230,000 in 1965.

The recession during the 1970s can be attributed to a change in the labour market for highly-educated persons. Employment difficulties became very noticeable in the majority of occupations, especially those recruiting graduates in the arts and social sciences. Particularly drastic changes occurred in the teaching profession. By the early 1970s the elementary and upper secondary school systems were fully developed, with the result that their recruitment needs declined abruptly. Something of a similar process occurred in the public sector, and the changes occurring here - which were sometimes very drastic indeed - imposed a great deal of organisational strain on the universities and colleges concerned.

2. THE REGIONAL DISTRIBUTION OF DEMAND

As stated above, there was a steep rise in total demand for upper secondary and higher education during the 1950s and 1960s. The regional distribution of that demand is illustrated by the series of maps in Figure 8.

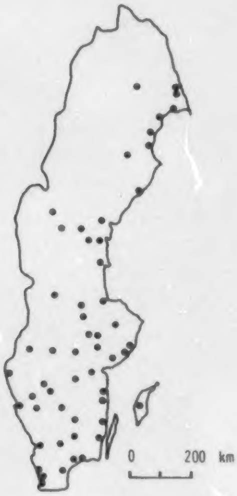
Applicants for upper secondary school

Demand for upper secondary schooling is measured in terms of first preference applicants as a percentage of their year (i.e. all 16-year olds). The average application rate is 88 per cent. As can be seen from Figure 8, demand is by no means evenly distributed throughout the country. Areas with employment difficulties - the General Aid Area (see Figure 2) and the south Swedish plateau - have high application rates. This heavy demand is linked with a higher than average number of upper secondary school places. The shortage of alternative occupations gives rise to the more generous view concerning the allocation of places and also explains the greater demand for places. One can also say that in regions where the labour market situation is bad, distances to employment are greater than distances to education. This creates an excess demand for education which in turn influences the allocation of places.

Post-secondary education

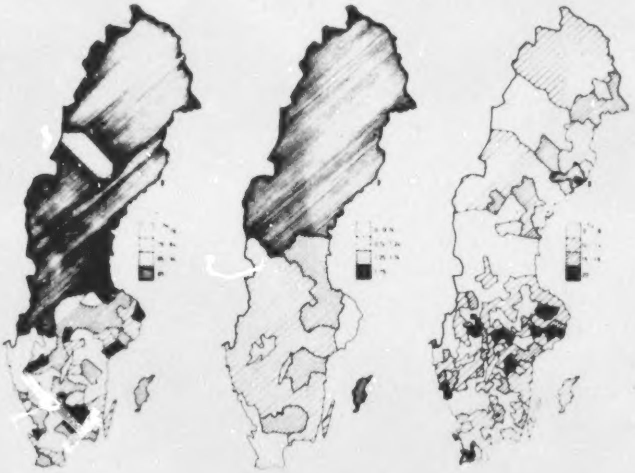
Figure 9 illustrates the demand for traditional higher education as it stood in the academic year 1972/73. Demand for university and college education does not by any means follow the same pattern as demand for upper secondary education. Large portions of the General Aid Area exhibit low transition frequencies. This can be taken to mean that upper secondary school leavers in these places prefer to apply for employment or for short-term vocational training rapidly leading to gainful employment. But the importance of the ready accessibility of educational opportunities can be clearly seen. For the academic year 1972/73, student frequencies within a 50 km zone round the university centres and outside the same zone are 20.7 per cent and 11.8 per cent respectively. The average for the country as a whole is 16.4 per cent.

Figure 7. LOCALISATION OF LABOUR MARKET TRAINING



Source : SOU 1974 : 79 Utbildning för arbete

Figure 8. DEMAND FOR UPPER SECONDARY EDUCATION, LABOUR MARKET TRAINING AND HIGHER EDUCATION IN SWEDEN IN THE EARLY 1970s. PERCENTAGES OF AGE GROUP, TOTAL POPULATION AND AGE GROUP RESPECTIVELY



Sources : Holm (1973), the National Labour Market Board (1975) and Hammarberg-Häggström (1974)

Labour market training is to be regarded as a complement to upper secondary and higher education. Figure 8 shows the number of education participations from one region in relation to total population. The labour market situation is reflected by the regional variations.

Regional changes in educational demand

Needless to say, the rapid expansion of upper secondary education during the 1950s and 1960s resulted in regional changes in the distribution of demand. It is not possible, however, to give an account of the changes here, because there are no reports available on the subject. On the other hand, corresponding analyses have been made concerning post-secondary education.

What changes occurred between the 1960s and the stagnation of the educational expansion in the early 1970s? What importance can be attached to the decentralisation of educational opportunities?

The series of maps in Figure 9 shows student frequencies for the academic years 1962/63, 1969/70 and 1972/73.

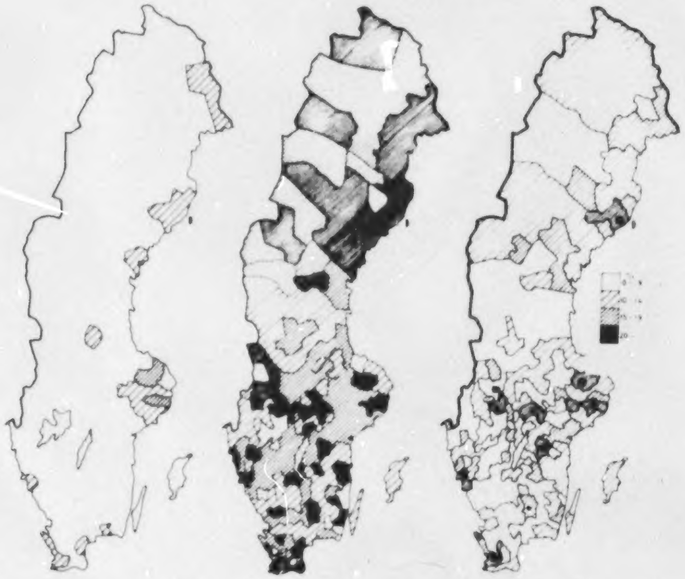
The general change occurring in the student frequency level with the passage of time is clearly apparent from the above series of maps. In 1962/63 there were only four university cities in the country (Uppsala, Lund, Göteborg and Stockholm), and higher frequencies were discernible in the zones surrounding them (see also Table 3).

This state of affairs is even more conspicuous in the academic year 1969/70. The high frequency rates recorded that year in the zones surrounding the new educational centres point to the importance of proximity to educational amenities.

Clearly the decentralisation of educational amenities leads to a higher demand for higher education (see also Figures 11 and 12). The situation - referred to in connection with upper secondary education - whereby certain areas with employment difficulties have a heavy demand for educational places is also reflected by the higher education material for the academic year 1969/70. The areas bordering on Finland, with their very serious employment problems, have high transition frequencies. With the decline in higher-education recruitment, however, it is no longer possible to speak in terms of any excess demand in relation to an average in areas with employment problems. If anything, the decline is more conspicuous at a distance from the educational centres. The tradition of studying at university or college is not particularly well developed in these areas.

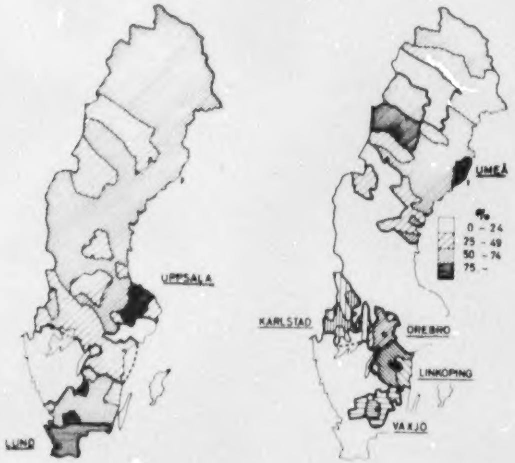
The employment difficulties confronting graduates led young persons to opt for vocational, often short-term, education instead of long courses of degree studies which were not guaranteed to result in correspondingly qualified employment.

Figure 9. HIGHER EDUCATION RECRUITMENT IN 1962/63, 1969/70 AND 1972/73. PERCENTAGES OF ANNUAL CLASSES.


0 - 9
10 - 14
15 - 19
20 -

Source : Holm-Häggström (1972) and Hammarberg-Häggström (1974)

Figure 10. RECRUITMENT AREAS OF SOME OF THE EDUCATIONAL CENTRES, 1962/63 AND 1972/73


UPPSALA
LUND
UMEÅ
%
0 - 24
25 - 49
50 - 74
75 -
KARLSTAD
OREBRO
LINKOPING
VAXJO

Source : Holm-Häggström (1972) and Hammarberg-Häggström (1974)

Table 3 summarises the importance of accessibility in determining student frequenceis.

Table 3

STUDENT FREQUENCIES IN AND OUTSIDE THE REGIONS IMMEDIATELY SURROUNDING THE EDUCATIONAL CENTRES

Proportion living within 50 km of education centres			Student frequencies (enrolment rate)		
	age-group population	student population	within 50 km	more than 50 km	total
1962/63	38	54	12	6	10
1969/70	51	61	26	18	22
1972/73	55	65	21	12	16

Source: Hammarberg-Häggström (1974).

As a result of the spread of educational opportunities and also as a result of migration, the proportion of the population living within 50 km of higher education amenities has increased. The above table also shows that no less than 65 per cent of students in 1972/73 came from areas less than 50 km away from the education centres. For the reasons stated above, this percentage rose during the 1960s. The frequency differences, referred to previously, between areas within and outside the zones immediately surrounding the educational centres are clearly apparent. The differences between these zones are not only due to increased accessibility but also reflect differences in social, occupational and economic conditions.

Higher education demand in relation to distance from education centres and social variations in the total population

The spread of higher education to new places in the 1960s decisively transformed the choice of educational centres open to students. During the later 1960s the new educational centres came to be surrounded by relatively stable recruitment areas within which the new universities or university branches predominated.

The new educational centres have above all affected the recruitment area of Uppsala University. First during the 1960s the establishment of Umeå University shifted the northern boundary of the Uppsala recruitment area further south. Later on the same area was encroached on in central Sweden with the opening of the university branches in Karlstad, Örebro and Linköping. In southern Sweden, the recruitment area for the University of Lund contracted as a result of the establishment of university and other higher education facilities in Växjö and Linköping.

Due to the decentralisation of higher education, the pressure on the old established universities has eased. At the same time the recruitment of students from areas close to the new university towns has improved. The new universities (or university branches) have continuously enlarged their recruiting areas. In addition these places recruit 70 per cent of the students within a radius of 50 km. Beyond this 50 km zone their influence rapidly diminishes (Figure 11).

This phenomenon is partly explained by the fact that the new sites for higher education still have a limited number of courses, and again it is due to the fact that they are recruiting a high ratio of students sensitive to distance, e.g. older and married students and those studying on exemption. The older and larger universities, with their broad range of university courses, are recruiting a higher ratio of students from zones close to the universities as well as at larger distances than the new sites do.

Social background

Social background does a great deal to influence young people in their choice of activities after elementary school.

> "One year after they had left elementary school (1972), 80 per cent of the children from graduate homes were still studying, as against 60 per cent of the children whose parents belonged to the "unskilled worker" category. The lower proportion of students among working class children was matched by a higher proportion of gainfully employed persons.
>
> "The clearest difference between pupils from different social strata is in their choice of studies. Whereas about 80 per cent of the sons and 65 per cent of the daughters of graduates went on to one of the three or four-year types of upper secondary school, only 12 per cent of elementary school-leavers from working-class families made the same choice. Whereas the overwhelming majority of the children of graduate parents went on to one of the three or four-year types of upper secondary school, working-class children usually went on to a vocational type of upper secondary school or a specialised course. The boys usually opted for training which focused on industry or handicraft, while the girls chose between domestic training, training for nursing and social services, and training for office or retail employment."(1)

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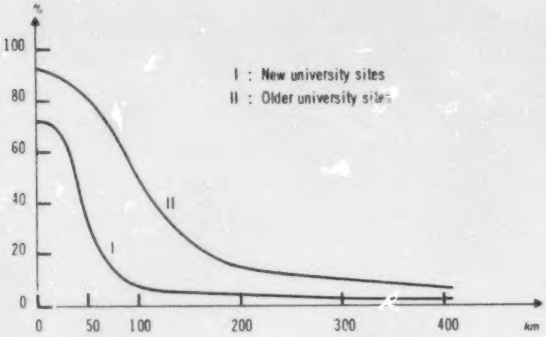
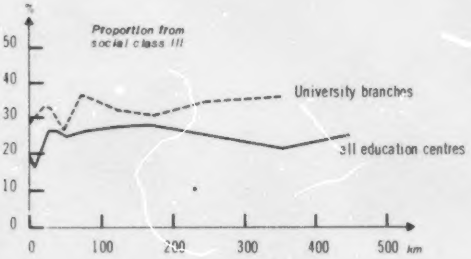
1) IPF 1976:6 Social Bakgrund och övergång till gymnasieskolans 3.ock 4-åriga linfer.

Figure 11. PERCENTAGE OF STUDENTS RECRUITED LOCALLY



Source : Holm-Häggström (1972).

Figure 12. STUDENTS FROM SOCIAL CLASS III AS A PROPORTION OF ALL STUDENTS HAVING THE SAME DISTANCE TO TRAVEL BETWEEN THEIR HOME AREAS AND THEIR EDUCATION CENTRES, 1972/73.



Source : Hammarberg-Häggström (1974).

Figure 12 also shows, however, that class III recruitment is fairly evenly distributed between different distances from the education centres.

Table 4

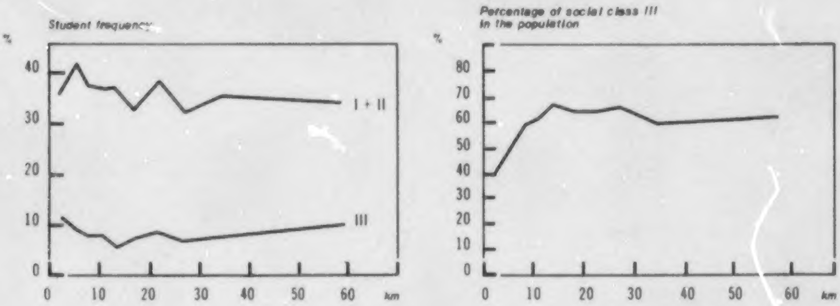
SOCIAL BACKGROUND AND ACTIVITIES ONE YEAR AFTER COMPLETION OF ELEMENTARY SCHOOLING, 1972

(%)

	Social background: / Activities	Graduates	Senior salaried employees	Other salaried employees	Skilled workers	Other workers	Unknown	Total
A. Men	Studies (upper secondary)	91	87	75	66	60	61	70
	of which:							
	3- and 4-year streams	79	55	31	20	12	15	27
	2-year tneoretical	5	14	18	11	10	8	12
	Other studies	6	18	27	35	37	38	30
	Gainful employment	9	11	18	24	32	28	23
	Job applicants	-	1	2	2	3	1	2
	Other activities	-	0	2	5	2	2	2
	Unknown	-	2	3	3	4	7	3
	TOTAL	100	100	100	100	100	100	100
	Population	2,233	6,508	12,966	8,513	17,908	3,223	51,351
B. Women	Studies	84	78	74	68	61	65	68
	of which:							
	3- and 4-year streams	65	44	26	19	12	19	22
	2-year theoretical	8	19	22	19	16	19	18
	Other studies	12	15	26	31	32	35	28
	Gainful employment	8	13	20	24	29	23	23
	Job applicants	3	2	2	2	3	5	3
	Other activities	0	2	2	3	4	7	3
	Unknown	4	5	2	3	5	1	3
	TOTAL	100	100	100	100	100	100	100
	Population	2,368	5,283	11,800	8,088	17,900	2,710	48,160

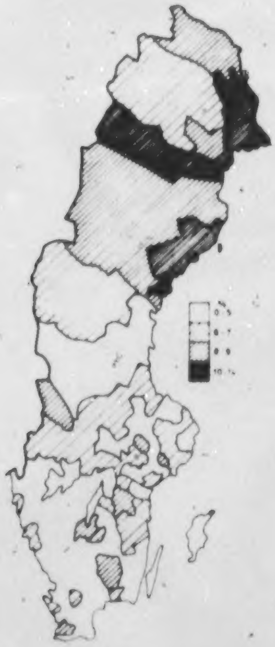
Source: IPF 1976:6 Social Bakgrund och övergång till gymnasieskolans 3.ock 4-åriga linfer.

Figure 13. RECRUITMENT FROM SOCIAL CLASSES I AND II AND FROM SOCIAL CLASS III IN REGIONS AT DIFFERENT DISTANCES FROM THE EDUCATION CENTRES



Source : Holm-Häggström (1972)

Figure 14. HIGHER EDUCATION TRANSITION FREQUENCY FOR SOCIAL CLASS III, 1969/70. PERCENTAGES OF THE AGE GROUP



Source : Holm-Häggström (1972)

The social background of post-secondary students

The total population can be divided into three social classes, according to parents' occupation, educational status and income.

Table 5

SOCIAL BACKGROUND OF POST-SECONDARY STUDENTS

Social Class	I Upper and upper middle class		II Lower middle class		III Blue collar workers	
Academic year	1969/70	1972/73	1969/70	1972/73	1969/70	1972/73
All Sweden	37	39	39	37	24	24
Old university towns (*)	41	42	37	36	22	22
New higher education centres (*)	24	28	44	41	32	31
Percentage of total population	11	n.a.	39	n.a.	50	n.a.
Transition frequency	74	n.a.	22	n.a.	11	n.a.

(*) The old university towns are Uppsala, Lund, Göteborg and Stockholm. The new ones are Umeå and Linköping, and there are university branches at Örebro, Karlstad and Växjö.

Measuring social status in relation to transition frequencies, one finds that in the academic year 1969/70 three out of every four young persons from social class I went on to traditional higher education; the corresponding figure for social class III was one in ten. By way of comparison, at the beginning of the 1950s only 1 per cent of children from social class III in each year went on to higher education, while the corresponding figure for social class I was 27 per cent. Thus one is entitled to say that limited equalisation occurred in social recruitment to higher education between the early 1950s and the 1970s. But the above table shows quite clearly that there is still a heavy bias in recruitment from the various social classes, despite the educational expansion of the 1960s. This social bias has actually been accentuated where prestigious study routes and study routes leading to high incomes are concerned. Moreover, the social bias in higher education recruitment is already apparent in choices between the theoretically-oriented streams of upper secondary school.

There is a clear difference between the social composition of recruitment in old and new education centres. The new centres have a substantially higher proportion of newly-enrolled students from social class III, a slightly larger proportion from social class II and a considerably lower proportion from social class I. It is also found that the zones surrounding the new education centres also recruit a larger proportion of students from social class III than do the corresponding areas round all education centres taken together. (Figure 12)

Figure 13 shows that the proportion of members of social class III in the total population rises up to a distance of about 120-150 km from the education centres and then levels out. Consequently the student frequencies for social class III (for the academic year 1969/70) decline from 12 to 6 per cent within these distance zones, despite the higher proportional recruitment. The frequencies then rise somewhat at even further distances from the education centres.

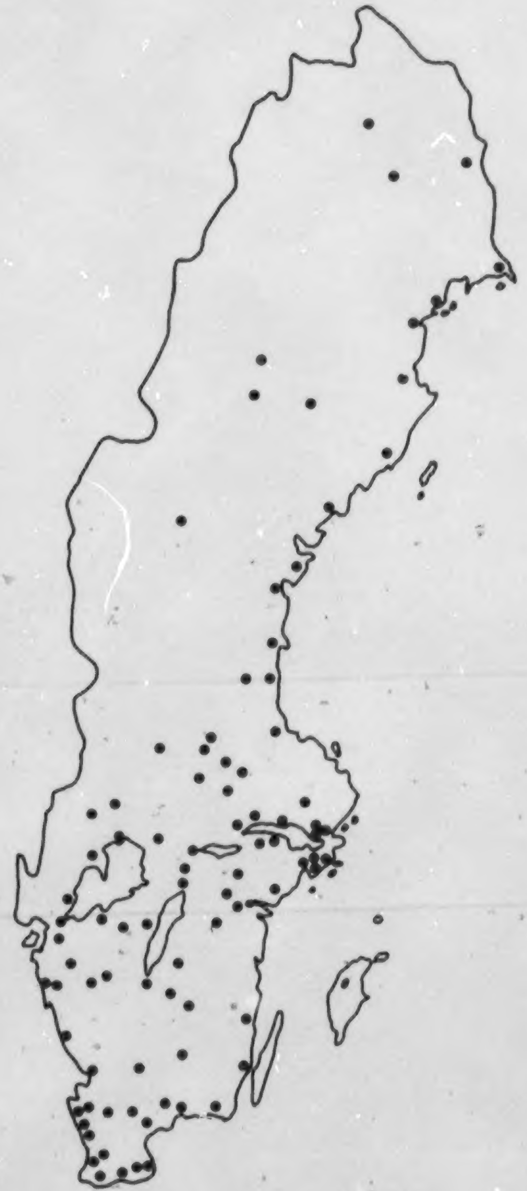
Figure 14 also shows that the transition frequencies of social class III are somewhat higher in the zones immediately surrounding the education centres. Thus the decentralisation of education could serve to increase recruitment from social class III, but this effect is limited.

This brief account is sufficient to show that the regional variations of social bias in recruitment are considerable but that they are small compared with the large average differences between the social classes. The great expansion of the education sector in Sweden and the diffusion of educational amenities have not made any decisive contribution towards the elimination of the recruitment gaps between the social classes.

The effects of the spread of educational amenities on the structure of recruitment in terms of age, the balance of the sexes and social status

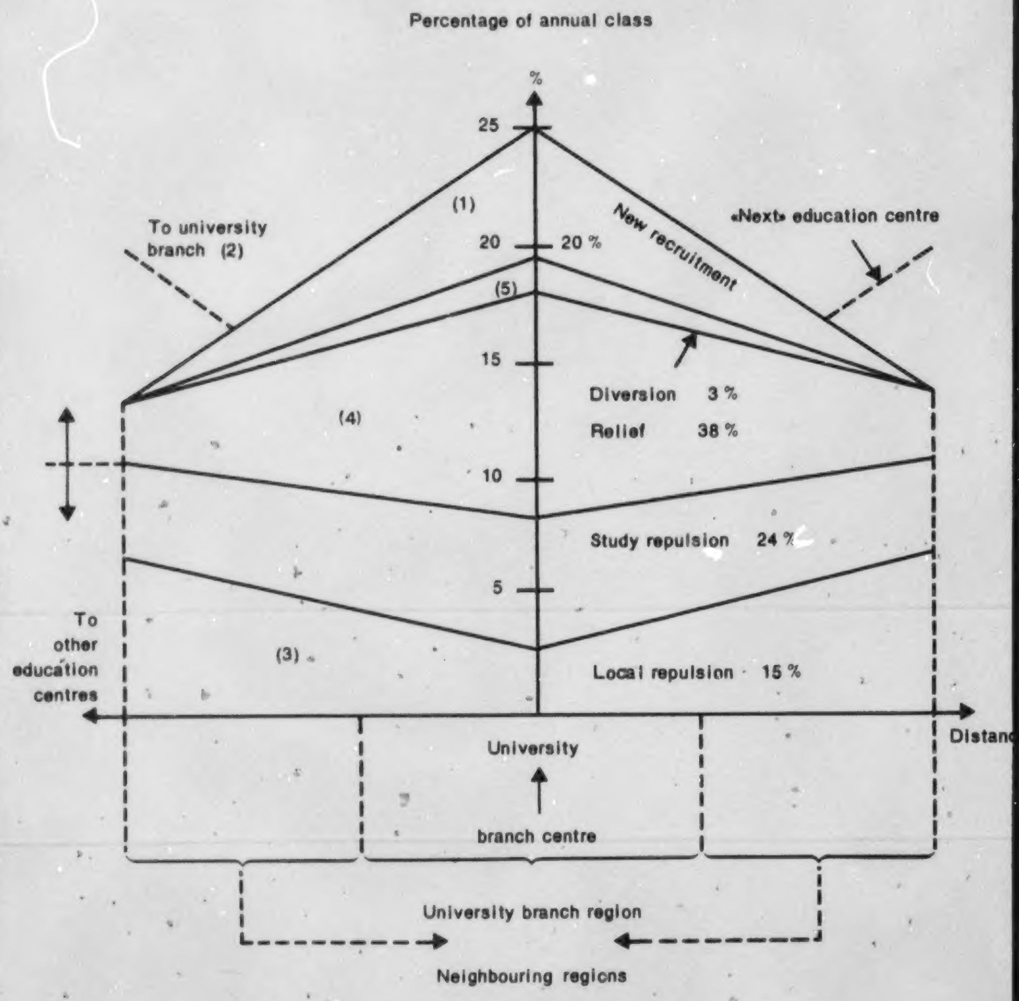
The bias in the regional and social structure of recruitment is accompanied by discrepancies in the sex and age pattern. In the academic year 1972/73, 43 per cent of the students enrolling for the first time were women. One is hard put to discern any pronounced change in the balance of the sexes during the educational expansion of the 1960s. A decade ago the overwhelming majority of students enrolled at Swedish universities were twenty years old and came straight from upper secondary school. With the more liberal admission rules, the increased decentralisation and the introduction of recurrent education, the percentage of older students (i.e. students over 25) has rapidly increased, from 19 per cent in the academic year 1969/70 to 31 per.cent in 1972/73.

Figure 15. **DECENTRALISED UNIVERSITY EDUCATION 1972/73**



Source : Hammarberg-Häggström

Figure 16. **RECRUITMENT STRUCTURE IN THE AREAS SURROUNDING THE UNIVERSITY BRANCHES, 1969/70**



Percentage of annual class
%
25
20
15
10
5
(1)
New recruitment
«Next» education centre
To university branch (2)
20 %
(5)
(4)
Diversion 3 %
Relief 38 %
Study repulsion 24 %
(3)
Local repulsion 15 %
To other education centres
Distanc
University
branch centre
University branch region
Neighbouring regions

Source : Holm-Häggström (1972)

Table 6

STUDENT CATEGORIES AT UNIVERSITIES AND COLLEGES

		1969/70	1972/73
Age(%):	≤ 19	38	23
	20-24	43	46
	≥ 25	19	31
Sex(%):	men	57	57
	women	43	43
Marital status(%):	married	14	19
	unmarried	86	81
Exemptions(%):		12	20

Source: Hammarberg-Häggström (1974).

University extension

Decentralised university education is provided in several places. This type of university training is organised by the Office of Universities and Colleges, the local education authorities or adult education associations. The decentralised university courses are mainly organised in the larger urban centres and do not substantially contribute towards a reduction of the existing gaps between urban and rural regions.

Higher education carried on outside the universities (in the form of what are termed decentralised university courses) has, generally speaking, a very narrow zone of influence. Nearly all students are recruited from the municipality where the courses are held.

Taking the country as a whole, extramural university studies raise the student frequency rates by about 2 per cent. In some municipalities, however, the rise is between 5 and 10 per cent. If anything the regional imbalance of student frequencies, as illustrated in Figure 9, becomes still more pronounced when allowance is made for the external courses. The bias displayed by extramural university education in favour of large and medium sized towns and cities also reinforces the findings quoted above concerning the decline in frequency rates as one gets further away from the densely populated municipalities.

The dependence of recruitment on the availability and scope of educational amenities

The recruitment effects of different orders of priority between completeness (breadth, variety) and availability (proximity) in connection with the localisation of education probably vary from one group of potential students to another. Some groups may be more sensitive to distance than others, and some may be more or less purposive than others in their choices of education.

- Distance-sensitive and purposive students

To a great extent this group comprises older, married, gainfully-employed and therefore locally-restricted persons. If rigid priority is given to a high degree of completeness, a large proportion of the members of this group will refrain from studying: in other words, there will be a selective recruitment drop-out. It would therefore be an advantage to this group if high priority were given to availability. Even if the education centres became more specialised, a larger number of people would have access to education of their own free choice, at the same time as purpose orientation would cause people who nonetheless found the distance too great to abstain from studies rather than choose locally-based education in which they were not really interested.

- Distance-sensitive and less purposive students

In composition this group probably resembles the preceding group, though it may include a larger proportion of younger persons with no job experience but with poor study motivation. Rigid priority for a high degree of completeness would therefore produce a heavy recruitment drop in this group as well. If high priority were given to availability, however, the recruitment drop from this group would be reduced to a still greater extent, since many people would then choose the nearest study route even if they would not have made the same choices in an educational centre offering more varied opportunities. The primary choice confronting this group may not be a choice between study routes but a choice between studies and gainful employment. Distance would decide the choice between the alternatives. In areas with a shortage of job opportunities, studies are often the alternative which, geographically, lies nearest at hand, and study frequencies are often high in such areas, particularly where vocational studies are concerned. The choice between a high degree of completeness and a high degree of availability is less easily determined where this group is concerned, because either choice will involve both advantages and disadvantages. Presumably the best solution from the point of view of this group is an organisation with a small number of programmes within all main sectors, because this facilitates a relatively small educational organisation per centre and, consequently, a high degree of availability: at the same time, it need not imply any controlled educational choice between educational sectors. "Control" within a main sector, particularly where this group is concerned, is unlikely to be so important from the point of view of either students or the community. Thus it is probably better for students to make the "wrong" choice in an educational sector of their preference than to abstain from studies altogether.

- Students who are insensitive to distance and less purposive

To a great extent this group comprises recent elementary school and upper secondary school-leavers with no pronounced motivation for study. In the absence of close links with a family, occupation and home area, comparatively weak impulses are sufficient to produce migration. In this group, therefore, rigid priority in favour of a high degree of completeness is hardly likely to produce a heavy drop-out. On the other hand it may well lead to the realisation of as spontaneous a study option as possible. It is therefore an advantage to this group if high priority is given to completeness. High priority in favour of availability will not bring about any substantial increase in recruitment, though on the other hand it may cause a re-alignment of choices in favour of local courses of education which do not necessarily correspond to the interests and needs of the students.

It is perhaps in this group that one finds the students who are "repelled" from their home area. If they can, these students choose a study route at a more remote education centre although it is really available in their home area. (This is only possible in certain cases where upper-secondary students are concerned.) This can result in a student choosing a study route which is not represented in his home area, even though his spontaneous choice could be provided for in his home area. Rigid priority in favour of a high degree of completeness is therefore an advantage to this group, because it enables more of them to "get away from home" without prejudicing their choice of study route.

- Students who are insensitive to distance and are purpose-orientated

A large proportion of the members of this group come perhaps from the younger age groups, but unlike the less purposive they may have a higher degree of motivation for study. Since their choices are not influenced to any great extent by the location of study routes, they are less interesting in the context of resources allocation.

Amenity profile and the direction of demand

- Upper secondary school

As was shown earlier in section 1, total demand where upper secondary school is concerned does not vary systematically with distance. The majority of young persons are within reach of some form of upper secondary education within commuting distance from their home areas. The existing differences could perhaps be better explained in terms of inverse differences regarding access to jobs. The direction of demand on the other hand is very much influenced by the profile of amenities. If education is divided into two groups - a more theoretical part and a more practical part - one finds (1971) that the proportion of 16-year olds applying for theoretical studies was about 25 per cent higher in municipalities providing such studies than in municipalities providing practical studies only or having no upper secondary amenities at all. The commoner types of education, however, are represented in about 120 regions (each comprising several municipalities). Thus when a certain type of educational amenity is lacking, more or less similar alternatives are generally available within the home region. How important is distance in this case? A division of opportunities into 37 types of education showed that the tendency to apply for a certain type of education is more than twice as great when that type of education is available within the student's home region. A type of education lacking in the home region is applied for by only 39 per cent of those applying for the same type when it is available in their home region. There are considerable differences between types of education which are of roughly equal size, although local excess recruitment is generally higher in the case of unusual (vocational) types of education than in the case of ordinary (theoretical) types of education.

To a great extent the bias in demand for education places corresponds to a bias in opportunities, and over the years these factors can influence one another and become more and more conspicuous. If, for example, nobody applies for the floor-laying sub-alternative, it will not be established and some other course of studies may be allotted more places instead. Young persons from the region may then apply for these places instead of travelling to a school further afield and studying to become floor layers.

- Higher education

Lines 2 and 3 in Table 7 reflect a similar difference between different types of education in recruitment for higher studies. The dependence of the various categories on proximity to the education centre can be assessed via the size of the "repulsion fraction". If this fraction is far smaller than the corresponding fraction for

Table 7

DISTANCE-SENSITIVITY OF STUDENT GROUPS

Category of newly enrolled students of whom:	Percentage of total number recruited during the period living within about 50 km of any education centre (1)	Repulsion percentage of column 1 not choosing the local education centre (2)	Total for all Sweden (3)
All students	61	17	26,509
To "branch lines"	58	11	14,863
To education with intake restrictions	60	34	5,416
Without complete offer Sec. leaving certificates (exemption)	73	12	4,773
Aged 25 or over	74	13	4,948
Married women	78	9	1,584
Married men	71	13	2,037
Unmarried women	60	19	9,807
Unmarried men	58	18	13,081
With graduate fathers	72	21	3,482
From social class I	70	19	9,277
From social class II	55	17	9,627
From social class III	52	15	5,931
Number aged 15-24 in population 1970	50		1,219,961
Student frequency	27		22

Source: Holm-Häggström (1972).

the entire population (17 per cent), this indicates a high degree of sensitivity to distance. A high proportion of students recruited within 50 km of the education centres (column 1) also indicates a high degree of sensitivity to distance, unless there is reason to suspect that the corresponding category in the age group is spatially biased in the same direction (as with the social classes, for example).

Education with a relatively small number of places attracts virtually the same proportion from the 50 km zone as education with intake restrictions. The low level of "distance sensitivity" is revealed by the fact that a considerably smaller proportion of these students than of students from other categories "choose" the local education centre; almost 34 per cent go to another education centre. Admission to a course of education with intake restrictions is evidently the most powerful reason for moving a long way away.

The repulsion percentage varies systematically with social status. As previously mentioned, the percentages within the 50 km limit tend to resemble the corresponding division within the base population. According to this calculation, students from social class III are somewhat more sensitive to distance than the total population, and this agrees with other findings.

Students without complete upper secondary school-leaving certificates (exemptions, etc.) and those who are aged 25 or over display almost the same sensitivity to distance as married women, who are the most sensitive group of all to distance; 78 per cent of married women students come from within the 50 km limit as against only 58 per cent of the unmarried male students, for example. Only 9 per cent of the married women choose an education centre which is not the nearest available, while the corresponding figure for unmarried men is 18 per cent and for all students 17 per cent. The greatest difference, however, is connected with marital status and not with sex.

What conclusions regarding the effects of educational decentralisation on recruitment can be drawn, for example, from the establishment of the four new higher education centres (university branches) in Örebro, Linköping, Karlstad and Växjö at the end of the 1960s?

i) During the early years of these branches, about 15-20 per cent more students were recruited within the 50 km limit than would have been the case if the branch activities had not been expanded. This new recruitment effect is a lasting one and was accentuated up to and including 1972/73. About 30 per cent of the students in 1972/73 can be regarded as new recruits. New recruitment in 1972/73 was mainly concentrated within the actual education centres. This can be put down to the facts mentioned above concerning the increased recruitment of groups sensitive to distance.

ii) Roughly half the enrolled population within the 50 km zones went to the university branches in 1969/70, the remainder went to other education centres.

iii) Of those who went to other education centres, about half (i.e. a quarter of the grand total) chose a course of studies also provided at the university branch (local repulsion).

iv) After the "new recruits" have been subtracted from those who opted for the university branch, we are left with about one-third of the total recruitment from the area (over 1,000 students per annum). These students relieve the strain on the older education centres, because they would have chosen one of the latter if the university branches had not been established. (The total relief is far greater, because half the students at the university branches come from places further away. If they are also included, the total relief amounts to more than 2,000 students per annum.)

v) The proportion of students recruited in the environs of the university branches and choosing the university branches was slightly larger than the proportion which would have corresponded to their educational amenities (completeness). This estimated "diversion" of study direction due to the choice of the nearby university branch is negligible, however.

3. EDUCATION AND THE LABOUR MARKET

To what extent are the regional idiosyncrasies of educational supply and demand connected with corresponding idiosyncrasies in local and regional labour markets? After they have completed their studies, do students obtain jobs in their home area appropriate to their qualifications?

No comprehensive studies have been made of these matters, but the following example from upper secondary school will shed a certain amount of light on the first question.

Most of the hundreds of study courses in upper secondary school are clearly vocational. Is their actual localisation adapted to their various labour markets, to the potential student population or to something else? This question is investigated by using a localisation model to effect an optimum regional distribution between 65 regions of the given total capacity for each course of studies. One calculation distributes the places in such a way as to minimise distances to the labour market, the labour market being represented by the number of persons employed in the occupation (sector) at which the education is primarily aimed.

The second calculation divides the places in such a way as to minimise distances to the potential student population, which is indicated by the number of 16-year olds.

How much difference is there between these two solutions, and how well do they tally with the actual localisation pattern? Table 8 shows some of the average results for four groups of upper secondary courses of study.

In 1975/76, 80 per cent of total capacity comes in the same school block whether localisation is based on potential student population or labour market conditions. Thus one-fifth of capacity acquires partly different localisations. For example, 16 per cent of capacity is "wrongly sited" in relation to both potential student population and labour market conditions. At the same time, localisation according to potential student population and localisation according to labour market conditions give the same alternative suggested localisations for 12 per cent of capacity. At least 12 per cent of upper secondary school capacity, i.e. 11,500 places, could be better sited than is now the case in relation to both potential student population and labour-market conditions.

In 1975/76 the classes are divided in such a way that 13.1 per cent of the places are situated in the wrong student area compared with a strictly proportional allocation in relation to numbers of 16-year-olds. In relation to labour market conditions, 13.6 per cent of the places are wrongly sited. If places are localised according to potential student population, the percentages decline to 3.4 and 6.8 respectively, while localisation according to labour market conditions reduces them to 6.7 and 3.3 respectively. Thus the bias in relation to labour market conditions is reduced by half when places are allocated according to the potential student population.

In all groups the errors in relation to labour market conditions are practically as large as the errors in relation to the potential student population. Moreover, this error is common to a great extent, i.e. if a class is "wrongly" placed in relation to the potential student population, it is often wrongly placed in relation to the labour market situation as well. Where the specialised courses are concerned, however, little more than half of the "misplaced" classes can be given an alternative localisation which is common to both potential student population and labour market.

There is less than one-tenth of the capacity "misplaced" in relation to the students whose localisation can be defended on grounds of a corresponding bias in the labour market.

To what extent do students obtain the kind of work they qualify for? By way of exemplification, here are some findings from a continuous study of students emerging from the vocational lines of upper secondary school in the spring of 1973.(1)

Eight out of every ten young persons were gainfully employed one year after completing vocational studies at upper secondary level, and one out of every ten was studying. Three per cent were job applicants and were not engaged in any activity outside their homes. On the other hand only half the students who had taken some courses of study were employed one year after completing their studies.

There are striking differences between the vocational decisions of boys and girls. Most of the girls were employed in nursing and social services, the clerical and retail sectors, or as domestic servants or children's nurses. The boys on the other hand were more evenly distributed among a large number of occupations.

Of the young persons who had trained for nursing and social services and forestry work, for example, more than 80 per cent had obtained work in the sectors for which they can be said to have primarily qualified. In most other streams too, the majority of students had found jobs in the "right" occupational category for their educational background. On the other hand those who had taken the consumer stream, the motor engineering streams and the telecommunications stream, for example, were less frequently found within the occupational sectors for which they had primarily qualified; about half of them had obtained the "right" sort of jobs.

Educational background often varies extremely widely in relation to recruitment in different occupational sectors, but most new recruits in the nursing and care sector, in clerical and retail employment, in building and in electronics come from corresponding courses of education.

The following particulars from a local continuous study in Skellefteå shed some light on the question as to which students obtain employment in their home area. What were the students who left school in the spring of 1973 doing four months later? Just over a third of the students who had taken the theoretical (three and four-year) streams of upper secondary school were employed, as against two-thirds of the students from the two-year practical streams and over half the students from the two-year theoretical streams and the specialised courses.

Half the ex-students in employment had found the type of work they wanted. Nearly one-third of the students who had pursued theoretical studies felt that the education they had received was "good" or "very good", while nearly two-thirds of the students who had pursued practical studies returned the same verdict.

Twenty-three per cent of the students who had completed prolonged theoretical studies in upper secondary school had migrated after four months, as against 12 per cent of students from vocational

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1) SÖ PI 1975:5, Efter gymnasieskolan.

Table 8

UPPER SECONDARY SCHOOL LOCALISATION IN RELATION TO POTENTIAL STUDENT POPULATION AND LABOUR MARKET

Type of education	Number of study routes	Total number of places	Percentages of "wrongly sited" places in relation to			Agreement between	
			Potential student population	Labour market	Both students and labour market	Actual location and student labour market	Student and labour market but not actual location
3- or 4- year streams	5	29,310	8	(8)	(8)	92	8
Certain 2-year streams	7	17,790	13	13	11	85	11
Vocational streams	23	38,156	16	16	12	80	11
Specialised courses	115	10,534	63	62	57	32	36
TOTAL	150	95,790	18	18	16	80	12

Source: Holm (1977).

Table 9

ACTIVITY BY ACADEMIC DEGREE, ACADEMIC YEARS 1970/71 AND 1971/72

(%)

Activity	Graduated 1970/71		Graduated 1971/72	
	6 months after graduation	3 years after graduation	6 months after graduation	3 years after graduation
Men				
Gainfully employed	68	88	66	90
Unemployed	5	1	7	1
Studying	21	9	21	8
Home-makers	0	0	0	0
Miscellaneous activites	7	1	6	1
Women				
Gainfully employed	56	73	57	73
Unemployed	7	2	7	3
Studying	32	13	28	12
Home-makers	5	12	7	11
Miscellaneous activites	1	1	1	1

Source: Information i prognosfrågor 1976:5 (SOS).

Table 10

GRADUATES BY OCCUPATIONAL FIELDS 6 MONTHS AND 3 YEARS AFTER GRADUATION. PERCENTAGES AND BALANCE OF SEXES.

Occupational fields	Men			
	1967/68	1971/72		1974/75
	6 months after graduation	6 months after graduation	3 years after graduation	6 months after graduation
Science	22	22	23	
Education	30	18	19	
Administration	21	25	23	
Law	8	8	8	
Commerce	5	4	5	
Accounting	6	10	9	
Psychology	3	5	5	
Other occupations	5	10	8	
Total	100	100	100	100

Occupational fields	Women			
	1967/68	1971/72		1974/75
	6 months after graduation	6 months after graduation	3 years after graduation	6 months after graduation
Science	7	7	6	
Education	36	24	32	
Administration	10	11	10	
Law	3	2	2	
Commerce	0	2	1	
Accounting	4	16	14	
Psychology	26	22	21	
Other occupations	14	16	13	
Total	100	100	100	100

streams. Moreover, 17 per cent of those who were in employment, 27 per cent of those who were still studying and 19 per cent of those who had unsuccessfully applied for employment had migrated within four months. The desire for further study appears to be a more powerful migration incentive than failure to obtain the employment of one's preference.

Higher education

Graduation frequency at universities and colleges in Sweden has been very high throughout the 1970s. This has created a certain excess supply in the labour market, which has had the effect of raising the unemployment rate among highly educated persons. This type of unemployment was particularly high between 1970 and 1972.

The adverse employment situation confronting new graduates forced many of them to seek employment in new occupational sectors, as witness above all the sharp decline in the proportion of graduates employed in education and a rise above all in the proportion employed in administration.

The excess production of graduates in the 1970s makes it very difficult to isolate the effects of educational decentralisation on regional labour markets. During the years immediately following the foundation of Umeå University in the north of Sweden, however, far fewer medical and dental appointments were vacant in the region than had been the case before the university was founded. The same applied to subject teacher appointments at the senior level of elementary school and in upper secondary schools.

The foundation of Umeå University may be said to have accelerated the elimination of regional variations in the labour market of northern Sweden, but this equalisation would in any case have been produced by the excess supply of graduates in the 1970s.

Labour-market training

During 1974 over 80,000 people completed special courses of labour market training. About 70 per cent of them had obtained gainful employment within three months of completing their training. About 15 per cent were receiving other training and about 7 per cent were unemployed.(1)

Roughly half the people completing their labour market training in 1974 obtained employment in a different sector from the one they had trained for, and 7 per cent moved away from their home county. This migration resulted in a net migration to the metropolitan regions and a corresponding net emigration from other regions.

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1) National Labour Market Board (1976).

4. EMPLOYMENT EFFECTS OF THE ESTABLISHMENT OF UNIVERSITY AND COLLEGE INSTITUTIONS

In its report the 1968 Education Commission (U68) observed that "The siting of higher education influences regional development and should therefore be closely geared to the regional planning of employment and services". What direct or indirect effects is higher education capable of having on the labour market? This question has been investigated in two surveys describing the build-up of Umeå University between 1959 and 1968(1) and the foundation of the university branches in Karlstad, Växjö and Örebro between 1967 and 1973.(2)

Each educational unit employs people directly in teaching, research and administration. The effects of this direct employment increment in a town or region depends on the size of the educational unit itself and on the size of the rest of the local or regional labour market. In the reports referred to here it is found that only the expanded university unit in Umeå is capable of influencing the economic structure of its region. The direct employment effects in the university branch regions are marginal, above all because from the very outset those regions had a flourishing and variegated labour market, but also because the units themselves are small as yet.

In Umeå the expansion of the university increased the personnel strength of the education sector by more than 1,300 between 1959 and 1968. This amounted to more than half the total rise in employment occurring in Umeå during the same period. In the university branch towns of Karlstad, Växjö and Örebro, the personnel strength of the education sector rose by no more than about 150 during the build-up period 1967-1973. This increase was a marginal fraction of the total rise in employment occurring in the university branch towns during the same period.

If the multiplier effects of the rise in employment within a sector are also taken into account, one is still left with a stronger impression that the establishment in Umeå of a relatively complete education and research unit has palpably affected the regional employment situation.

Indirect employment effects include, for example, new employment created in the building and construction sector, in the service sector and in social sectors with a heavy demand for qualified personnel.

Employment in the building and construction sector is primarily concentrated within the build-up phase of the unit's development. For a few years, therefore, the new education centres show employment increases distinctly higher than the national averages for the sector. At times during the build-up phase Umeå was short of building workers.

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1) Bylund-Dahlberg-Olsson (1968).

2) Pettersson-Pettersson (1974).

The service sector in the new education centres can meet with increased purchasing power deriving from students and persons employed at the educational unit. The Umeå survey points to steep rises in sectoral turnover figures and the bringing forward of department store building projects in the university branches also revealed a steep rise in purchasing power, but this was marginal in character when compared with the general purchasing power of these regions. The increased purchasing power created new job opportunities in the sector.

A new unit of education and research in a region creates openings for the establishment of new facilities by firms whose activities demand a special research environment. But the above-mentioned surveys from Umeå and the university branch towns point to only a small number of new ventures where the new educational unit has been an impelling force of this kind. Thus two pharmaceutical companies have established local production facilities in Umeå, and co-operation between the companies and medical research at the university was a decisive factor in the choice of location. It has been more difficult to identify corresponding ventures in the university branch towns, probably because the branches have existed for such a short time that their research activities are still quite limited in scope.

The build-up of Umeå University was one way of creating job opportunities and at the same time improving the social and cultural infrastructure of the northern problem areas. This successful attempt has been followed by the foundation of the university branches in Sundsvall and Östersund and the Institute of Technology in Luleå. The attempt to build up the social (educational, cultural) infrastructure in the Northern Development Area is important, as employment in such functions tends to expand faster than employment in routine functions (the production and handling of goods). The same trend can be observed in public administration and other services. In the attempt to create functional self-generating development poles at a high hierarchical level in different parts of the country, university (or university branch) foundations will play an important part.

Summing up, both the direct and indirect employment effects of the establishment of a new higher education unit are marginal if the new unit is a small one, but they are all the more important when the unit is complete and includes both basic studies and research.

VI. CONCLUSIONS

Post-war education policy in Sweden has been aimed among other things at making education more readily available to all, at widening and differentiating educational amenities and at making educational organisation more democratic. The education policy adopted has been successful in improving the *availability* of educational amenities in purely spatial terms. The expansion of the compulsory nine-year elementary school has helped to offer all parts of the country satisfactory schooling at senior level within acceptable distances from the students' home areas. Similar developments have occurred in upper secondary education. The geographical availability of higher education was substantially improved by the establishment of two new units of higher education in the 1960s, added to which the impending reform of higher education emphasises the importance of job experience as a qualification for admission to higher education, as well as the focusing of a larger proportion of educational activities on recurrent-vocational education.

This improved access has resulted among other things in quite a heavy recruitment of students from population groups which are sensitive to distance (elderly persons, married persons and students by special dispensation). The same effect can be observed in the various forms of university extension activity which are being conducted in many parts of the country. The decentralisation of education and the organisation of university extension courses have satisfied demand on the part of locally-tied individuals whose alternative has been to abstain from studying.

From an egalitarian viewpoint, however, greater importance is attached to the efforts made to improve the availability of education to *everyone* regardless of social background. Although in *absolute figures* recruitment to higher education from the working class has risen steeply, in *relative terms* working class students are greatly outweighed by other student groups. It is far more doubtful, therefore, whether the changes made in the organisation, scope and siting of education have had any *major* effect on the *social* bias in upper secondary and higher education recruitment. Most young people from working-class homes now receive upper secondary schooling (mostly in the more vocational streams), which was not the case formerly. In the more theoretical fields of study, however, as in higher education, the same social groups predominate as before.

Practically the whole of social bias in higher education recruitment is already established when students choose their courses of upper secondary education. It is therefore questionable whether organisational changes at post-secondary level can be expected to produce any appreciable social equalisation of recruitment direct from upper secondary school. Greater effects would presumably be achieved if corresponding resources were already to be applied at the senior level of elementary school. The equalisation nonetheless occurring has mainly benefited the younger generation.

Recurrent education should be viewed in this perspective. Experience so far concerning the age structure of the post-secondary student population has shown that many older people have utilised the new educational opportunities in recent years. Many of these older students, however, already have an impressive educational background. The provision of new types of educational amenities, evening classes, half-speed studies, etc., have made it possible for them to improve their general education on something of a hobby basis and with varying degrees of relevance to their vocational activity. On the other hand the new amenities often correspond to a direct need for further training in the occupations of the people concerned, bordering on the limits of the instruction available in the form of in-plant personnel training. Both the "hobby" and vocational training motives are legitimate reasons for the institution of recurrent education. These needs are often confined to certain groups in certain places. During the first year of a new course in a new locality, the participants recruited comprise a large proportion of the locally-tied people who have long been in need of that particular type of education. This pent-up demand can be several times greater than the annual increment, which suggests that instead of having fixed points only, we should distribute education from certain educational centres to the various parts of the educational regions, i.e. establish a "peripatetic" or "outgoing" system of higher education or distance teaching which can also cater for temporary acute needs. Educational distribution of this kind could be something for the new regional boards to initiate, co-ordinate and plan.

Eventually, perhaps, individual students may no longer need to risk long-term or short-term economic loss by opting for education. The continuing emphasis on gainful employment as the socially most acceptable activity may lose more ground. When this happens, recurrent education - even as a hobby or for purposes of general education - may also become a reality for people whose studies have not extended beyond the range of compulsory schooling.

Résumé du rapport technique N° 8

EFFETS REGIONAUX DE LA PLANIFICATION DE L'ENSEIGNEMENT EN SUEDE

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Dans ce rapport, préparé par l'Université d'Umeå (l'un des nouveaux centres régionaux suédois d'enseignement supérieur) les auteurs commencent par souligner les déséquilibres démographiques et économiques régionaux de la Suède, le développement du nord et de l'ouest du pays étant particulièrement défavorable à cet égard. Depuis 1972 cependant, il y a eu une intégration croissante de la planification sociale à celle des aménagements urbains et des structures régionales. Dans le domaine de l'enseignement, le problème principal a été de définir et d'aménager, suivant un ordre de priorité, une répartition efficace, l'égalité d'accès, les besoins du marché du travail et les préférences des étudiants. Au cours des dernières années, de grands changements en ont résulté dans le système éducatif. En 1962, l'introduction de l'école de base obligatoire de neuf années a permis de donner, dans toutes les parties du pays, un enseignement élémentaire satisfaisant ; en 1971, l'instauration de l'école secondaire intégrée a permis à pratiquement tous les enfants (88 %) de poursuivre des études après l'enseignement obligatoire ; depuis juillet 1977, l'enseignement supérieur suédois est réparti en six régions académiques, dont les villes universitaires actuelles seront les centres. Aujourd'hui, des possibilités d'enseignement supérieur sont disponibles dans environ une vingtaine de centres, alors qu'il n'y en avait que quatre vers 1950 : les nouveaux centres sont en outre plus grands, mieux liés à la recherche, plus démocratiques et plus décentralisés. Il existe aussi une "politique de formation dans le cadre du marché du travail" en vue de doter les individus de qualifications nouvelles et de leur permettre de s'adapter aux conditions actuelles de ce marché.

CHANGEMENTS REGIONAUX DE LA DEMANDE D'EDUCATION

La décentralisation des structures d'enseignement a entraîné une demande croissante d'éducation supérieure (avec, cependant, un tassement dans la décennie actuelle) émanant surtout de la population vivant dans un rayon de cinquante kilomètres des centres éducatifs. Mais les différences de classes persistent bien qu'une certaine égalisation se soit produite dans le recrutement entre le début des années 50 et 70. Les centres les plus récents, cependant, accueillent actuellement une proportion importante d'étudiants de la classe sociale III (travailleurs à cols bleus), alors que ceux de la classe I (groupes à revenus élevés) sont peu nombreux.

LES EFFETS DE LA DISPERSION DES POSSIBILITES D'EDUCATION SELON L'AGE ET LE SEXE

Avec l'introduction de critères d'admission plus libéraux, l'accroissement de la décentralisation et l'introduction de l'éducation récurrente, le pourcentage des étudiants "moins jeunes" s'est accru de 31 % du total en 1972/73 ; la même année, 43 % des nouveaux inscrits étaient des étudiantes. Pour l'ensemble du pays, les études universitaires "extra-muros" ajoutent quelque 2 % au nombre des étudiants.

DISPONIBILITE (PROXIMITE) ET AMPLEUR DES POSSIBILITES D'EDUCATION

L'effet qu'a sur le recrutement l'ordre de priorité établi entre l'ampleur (portée, variété) et la disponibilité (proximité) liée à la localisation des établissements varie probablement d'un groupe d'étudiants potentiels à un autre. Certaines catégories sont plus sensibles que d'autres à la distance, les femmes mariées par exemple, et certains groupes ont des intentions moins précises que d'autres dans le choix de leurs études. Des solutions différentes sont envisagées pour ces diverses catégories.

AMPLEUR DES POSSIBILITES D'EDUCATION ET ORIENTATION DE LA DEMANDE

L'orientation de la demande est fortement influencée par la nature des options offertes. Dans l'enseignement secondaire de deuxième cycle, une division de l'enseignement en 37 types a permis de constater que la tendance à choisir l'un d'entre eux est deux fois plus grande quand il est disponible dans la région même où réside l'étudiant.

EDUCATION ET MARCHE DU TRAVAIL

Les auteurs avancent ici la possibilité de trouver un emploi lucratif dans les trois mois qui suivent la fin des études, et discutent des types de migration liés à la recherche d'un emploi ou au désir de poursuivre des études. Ils estiment qu'au moins 12 %, c'est-à-dire 11 500 places, de la capacité d'accueil du second cycle secondaire pourraient être mieux situés qu'actuellement en fonction à la fois de la population potentielle d'étudiants et des conditions du marché du travail. Dans l'enseignement supérieur, la production excessive de diplômés dans la décennie 1970 rend extrêmement difficile l'appréciation des effets de la décentralisation de l'enseignement sur les marchés du travail régionaux.

LES EFFETS SUR L'EMPLOI DE L'IMPLANTATION DE FACULTES UNIVERSITAIRES ET DE COLLEGES

Les effets directs et indirects (construction, services, etc.) sur l'emploi que peut entraîner l'implantation d'une nouvelle unité d'enseignement supérieur sont marginaux si celle-ci est de petite taille, mais ils sont extrêmement importants si elle a un caractère complet et comprend à la fois les enseignements de base et la recherche. En outre, les firmes dont les activités requièrent un environnement spécial de recherche sont un facteur d'attraction pour les régions possédant des unités d'enseignement supérieur.

CONCLUSIONS

La politique d'éducation adoptée en Suède a très largement réussi à améliorer l'offre de possibilités d'éducation sur le plan territorial. L'assouplissement des conditions d'accès a abouti à un accroissement remarquable des étudiants provenant de groupes sociaux sensibles à la distance, par exemple les personnes d'âge mûr ou mariées, qui, autrement, n'auraient pas entrepris de poursuivre des études. Du point de vue de l'égalité, cependant, les changements apportés à l'organisation, à la portée et à la localisation de l'enseignement n'ont pas eu l'effet désiré sur le déséquilibre social dans l'enseignement secondaire de second cycle et l'enseignement supérieur. C'est surtout dans les études de nature théorique que ce déséquilibre persiste.

En ce qui concerne l'enseignement supérieur ou l'éducation des adultes, un système mobile pourrait améliorer encore l'accès à l'enseignement, en particulier pour les gens qui ne peuvent faire de déplacements. Il faudrait aussi que le critère de l'emploi lucratif perde de son importance afin que, pour un nombre important de gens, l'éducation récurrente puisse en fait être considérée comme un hobby ou comme orientée vers une finalité culturelle. Dès lors, choisir de faire des études ne devrait plus représenter pour les étudiants une perte économique à court ou à long terme.

Technical Report No. 9

UNIVERSITY AND ITS ENVIRONMENT: THE FINNISH EXPERIENCE

by

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I. THE HIGHER EDUCATION NETWORK IN FINLAND

1. THE CONCEPTS AND THE PROBLEM

Regional studies use the concept of region mainly in three senses: as a unit homogeneous in respect of one or several physical, economic or social features; as a unit differentiated in its internal structure or as an object of planning and decision-making; or as a planning unit. The methods of approach are not mutually exclusive but complementary.

Regional differentiation leads to the formation of centres, and the final outcome is a functional regional structure. This comprises the different communities and their interaction in commerce and industry, in the use of services and other social factors. If, in accordance with central-place theory, main attention is given to the regional distribution of services, and the centres and their areas of influence are regarded as the most important ingredients of the functional regional structure, this regional structure is called a network of centres. Higher education services are comparable to the other services. Thus the functional regional structure of higher education institutions and their areas of influence can be called a higher education network.

The concept of "influence area" is usually taken to mean the relative area of influence or the area in which the influence of a given centre is stronger than that of any other centre of the same order. The influence area is therefore a kind of functional network around the centre. Often it is a uniform or "homogeneous" one in the sense that it has a specific identity, different from the other regions. It is also an area whose development can be directed by planning and political decision-making, though with certain limitations due to its administrative position.

The network of centres is not a result of market economy only but it is largely the result of planning and political decision-making. This applies particularly to services with a quantitative development dependent on political decisions. The higher education system is a good example of this.

The aim of this study is to identify and discuss the factors which have influenced the creation of the higher education network, the regional expansion of the higher education system and the present higher education network. The central place theory, in the form developed by Christaller and Lösch, includes a number of conclusions and presumptions about the size and number of centres, and the geometric shape of the network of centres and its parts. The theory is, however, based on several highly idealised assumptions and reflects the agrarian society in which it was created. The purpose of this study is not, therefore, to test the validity of this theory in respect of the higher education network.

2. FACTORS CONTRIBUTING TO THE CREATION OF THE HIGHER EDUCATION NETWORK

The creation of the network of centres and the higher education system

In locating public services, the Government has tried, on the one hand, to adapt to and promote development and, on the other, to steer it and regulate disrupting effects caused by the market powers by strengthening the regional network of infrastructure and services. This network includes the educational services. The educational level presupposed by production required a reorganisation of educational services on a regional basis. With the rise in the level of basic education the organisation of the intermediary and higher levels of education became more important. The efforts to provide an even regional distribution of educational services are, however, also influenced by political factors. Regional policy based on regional equality and the concept of a welfare state aim to provide equal opportunity for everybody, for instance, in access to education. The regional development of the education system, higher education included, is thus based on both practical and political demands.

The increase in the number of students in higher education, contrary to the other levels of education, was already quite large at the turn of the century, even by international standards. This might be due - apart from specific national features - to the very lack of other vocational education. The next great expansion of the higher education system since the turn of the century took place in the 1960s and 1970s. This expansion has been largely regional. New higher-education institutions have been established in various parts of the country, while efforts have been made to curtail the growth of enrolments in the higher education establishments of Helsinki and Turku.

The character of higher education and the expansion of the higher-education system

The German university was the model for the University of Helsinki, and the newer universities and institutions of higher education are also similar to it in many respects. Social change and the growth of the number of students in higher education have, however, altered the situation. Universities and other higher-education institutions now provide vocational education for large numbers of people and this makes new demands on their activities. At the same time, the dividing line between "pure" sciences and vocational education has become less hard and fast. Along with the expansion of higher education and the further specialisation of research, interaction among the different branches of science has also changed. At present, the number of students at the University of Helsinki is over twenty thousand. The development of the higher education system has led not only to new universities, but also to new *higher-education institutions* with a more limited range of study. The higher-education system is, however, still devoted to scientific research. Its social task is to collect and systematize knowledge and the ideal of interaction between research and teaching is still valid. As the expansion of the higher-education system proceeds, the character and the qualifications of higher-education units for providing vocational education and conducting scientific research must be continually assessed. Taking into account the need for higher-education institutions, the alternate methods of expansion and their effects on regional accessibility can be illustrated by the following diagram.

Figure 1

HIGHER-EDUCATION MODELS AND THEIR REGIONAL ACCESSIBILITY

		"Density" of education	
		dense	sparse
Range of education	narrow	higher-education institution	special higher-education institution
	comprehensive	open university	university

"Density" of education here means the distances between higher-education units or the density of the higher-education network. *Range of education* means the range of the various branches of study represented in each unit of higher education. Regional accessibility of education depends on both the "density" and the range of education available. In the discussion of equal educational opportunities

attention has principally been paid to the "density" of education, and the connection between accessibility of education and the range of study provided by units of higher education has sometimes been overlooked. Maximum "density" of education alone does not guarantee equal educational opporunity.

In the framework of traditional academic higher education there are three types of higher education institutions: universities, special institutions of higher education and higher-education institutions. Differences between them are not always very clear. However, it may be said that, up to the 1960s, the higher education system in Finland consisted mainly of universities and special institutions of higher education. The university problem in eastern Finland was resolved by the establishment of two higher-education units, in Kuopio and Joensuu, which may be best classified as higher-education institutions. The reorganisation of the higher-education system has also produced various models in other countries - such as subsidiary university (Sweden), regional university (Norway), comprehensive university (the Federal Republic of Germany) and the use of far-distant institution (e.g. several socialist countries and Sweden) - which differ in essence from the traditional models and those presented in Figure 1. In Finland, the subsidiary university system has been used to attach teacher training to higher-education institutions. The teacher-training college of Hämeenlinna is attached to the University of Tampere, the teacher-training college of Rauma to the University of Turku, the teacher-training college of Savonlinna to the University of Joensuu, the teacher-training colleges of Kajaani and Rovaniemi to the University of Oulu, and the educational faculty and teacher-training college in Vaasa to Åbo Akademi. There has been no further introduction of these new types in Finland.

The Open University can be entered without upper secondary education. It has, at least in theory, a narrower population basis than any of the other models in Figure 1.

The role of political decision-making

A rapid growth of higher education and other education has created a realistic prerequisite for the regional expansion of the system of higher education during the past few decades. It has made possible the establishment of new institutions of higher education and the enlargement of the existing ones. One higher education unit has been transferred to another region as an alternative to the growth of an existing university. The School of Social Sciences has been transferred from Helsinki to Tampere.

Decision-making has also included an aspect of "self-guidance". The expansion of the system of higher education has in some cases encouraged regions and larger cities with no institution of higher education to request one.

The representation of decision-makers is based, except for the political distribution, on geographical regions, in fact, offficially on the latter. Sometimes, various regions have joined together to gain the necessary strength to influence decision-making. If a province of an electoral district does not constitute a region large enough to justify certain measures, regions may combine to form a larger one, for instance, northern Finland or eastern Finland. This has also influenced the shape of the higher-education network.

3. THE PRESENT NETWORK OF HIGHER EDUCATION

The institutions of higher education and higher education centres

Regarding the location of the institutions of higher education in the national network of centres, it should be remembered that the relationship between the higher education institutions and the network of centres is not a passive one-way relationship; in fact, the network of centres is to some extent influenced by the higher education institutions.

The first remark to be made is that education tends to conglomerate around Helsinki, i.e. the capital centre (Table 1). The tendency is so strong that the other regional differences are to a considerable extent covered by it. However, a closer observation by field of study shows up additional features:

- relatively narrow fields of study such as agriculture and forestry, theology and law, are only to be found in one or two institutions and are normally concentrated in the area of Helsinki or Turku; as all the other fields of study are also represented in these higher education centres, this is another reflection of the hierarchical character of the higher education network;
- the distribution of technological and economic studies largely correlates with the regional differences in the industrial structure;
- fields of study connected with the basic social services, such as health care and education, are more evenly distributed among various parts of the country; these fields include medicine and studies mainly pursued by teachers, such as teaching theory, mathematics, science and the humanities.

As for the other parts of the country, the identification of interprovincial centres and areas of influence is more problematic. On the one hand, there are no doubt services which are not represented even in the provincial centres, on the other, however, there is no supraprovincial administrative system of larger regions with a definite identity. The main regions and the regional centres(1) of the country were identified in a study of the national network of centres in 1967. According to this study, the centres of the region of southern Finland were Turku and Tampere, which are both university towns, and the centre of northern Finland was Oulu, also a university town. The centre of western Finland, Vaasa, and that of eastern Finland, Kuopio, had no institution of higher education. Subsequently, both established a higher education unit - though only a rather small one. Consequently, all the cities regarded as regional centres have some kind of higher education, although the units of higher education differ in size and the range of studies available.

The areas of influence and recruitment for the institutions of higher education

The concept of influence area was used in this study primarily in the sense of relative area of influence, an area unit between the State and a local community (university town). A nation-wide consideration, however, also necessitated the use of the concept of absolute area of influence. As the main purpose of institutions of higher education is to provide education, it was natural that, in an empirical study, the definition of areas of influence would be based on the areas from which the institutions of higher education recruit their students, i.e. the recruitment areas. At the same time, it should be remembered that another basic task of higher education institutions is research work, and the regularities discovered do not concern research. In analysing stud[illegible] recruitment, the unit employed was the province. For the purpose [illegible] study of influence areas, the province is a rather rough unit, compared with the municipality, for instance, but the use of smaller units would have made the comparison with earlier statistics impossible. Statistical comparison would have been equally impossible if the historical provinces had been used as units instead of the present provinces. The historical provinces are not used as units of planning and decision-making in the way the present provinces are.

The areas of influence and recruitment for higher education institutions have naturally existed as long as the system of higher education itself. Formerly, the influence areas of the few existing higher-education units, those of Helsinki and Turku, covered the whole country. Thus the establishment of new higher-education units

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1) In identifying the regional centres, one indicator was the existence of higher education units; thus the initial remark concerning the mutual relationship between higher education units and the central network is particularly relevant in this context. Also some of the present education units (those of eastern Finland and the Vaasa School of Economics) do not exist yet.

Table 1

THE INSTITUTIONS OF HIGHER EDUCATION AND HIGHER EDUCATION CENTRES

University town	Centre category	University	Percentage of the total number of students	Number of teaching staff
Helsinki (& Espoo)	Capital	- University of Helsinki	30.0	234
		- Helsinki University of Technology	9.3	78
		- Helsinki School of Economics	6.3	18
		- College of Veterinary Medicine	0.3	11
		- Swedish School of Economics	2.4	11
		Total	48.3	352
Turku	Regional	- University of Turku	11.7	91
		- Turku School of Economics	1.8	6
		- Åbo Akademi	4.8	45
		- Åbo Swedish University School of Economics	0.9	4
		Total	19.3	146
Tampere	Regional	- University of Tampere	9.1	56
		- Tampere University of Technology	2.5	24
		Total	11.6	80
Oulu	Regional	University of Oulu	8.6	90
Vaasa	Regional	Vaasa School of Economics	1.3	7
Kuopio	Regional	University of Kuopio	1.0	24
Jyväskylä	Provincial	University of Jyväskylä	7.8	41
Joensuu	Provincial	University of Joensuu	1.4	7
Lappeenranta	Provincial	Lappeenranta University of Technology	0.7	8
			100 67844	755

has also created a number of relative recruitment areas. The expected tendencies were verified by the results:

- although all institutions of higher education recruit students from all parts of the country, most students come from the province where the institution is located; this phenomenon is so marked that it can be seen as a peak in the statistical group;
- the proportion of students coming from the neighbouring areas differ from institution to institution; the differences are, however, mainly due to the extent of educational opportunities offered by each institution, and evidently the development of small institutions of higher education would increase the proportion of students from the neighbouring area;
- the (relative) recruitment areas of the higher-education institutions of Helsinki, Turku and Tampere have become smaller during the 1960s and 1970s;
- at the same time, the (absolute) recruitment areas of the universities of Jyväskylä and Oulu have expanded, so that the proportion of students coming from the provinces where the universities are located has diminished;
- the student recruitment of the Swedish-language institutions of higher education has changed to the extent that the proportion of students from the province of Uusimaa in the Swedish School of Economics has increased, and Swedish-speaking students from Pohjanmaa are moving in increasing numbers to the Swedish higher-education institutions in Turku.

An accurate delineation of the present recruitment areas of the institutions of higher education is not particularly useful as the situation is constantly changing because of increases in student numbers and their distribution. However, it seems clear that, out of the Finnish and bilingual institutions of higher education, only the University of Helsinki and the University of Oulu have recruitment areas which are markedly larger than the provinces in which the institutions are located. On the other hand, the recruitment areas of the institutions of higher education in Turku and Tampere (other than universities) and the University of Jyväskylä are much more limited and it is from the provinces in which they are located that they receive the largest proportion of students. The regional expansion of the system of higher education - if it continues and if the growth is directed more evenly to various parts of the country, while the growth of the institutions of higher education in Helsinki is further restricted - will tend to make the relative recruitment areas of the institutions of higher education coincide more or less with the provinces. In some provinces, however, the number and structure of the population does not justify the establishment of the present type of

Table 2

THE INSTITUTIONS OF HIGHER EDUCATION AND THE PROPORTION OF STUDENTS RECRUITED FROM THE NEIGHBOURING AREAS(1)

University	Proportion of students from university province out of total number of entrants (%)		Proportion of new entrants from its province of location (%)
	in 1970	in 1974	autumn 1974
- University of Helsinki	43	51	46
- Helsinki University of Technology	36	53	11
- Helsinki School of Economics	60	62	11
- College of Veterinary Medicine	21	42	1
- Swedish School of Economics	81	90	10
Universities of Helsinki TOTAL	46	56	79
- University of Turku	52	58	50
- Turku School of Economics	46	46	5
Finnish Universities of Turku TOTAL	51	57	55
- Åbo Akademi	41	28(2)	9
- Åbo Swedish University Schools of Economics	48	36	2
Swedish Universities of Turku TOTAL	42	29	11
- University of Tampere	39	43	33
- Tampere University of Technology	(3)	33	8
Universities of Tampere TOTAL		41	41
University of Oulu	55	52	61
University of Jyväskylä	32	26	54
Vaasa School of Economics	30	36	6
University of Kuopio	(4)	40	12
University of Joensuu	65(5)	39	55
Lappeenranta University of Technology	33	44	6

1) In addition to students coming under the legislation on the development of higher education, students in teacher training are also included.
2) The Faculty of Education of Åbo Akademi is in Vaasa (1973).
3) Tampere University of Technology became independent in 1972.
4) The University of Kuopio started its activities in 1972.
5) The University of Joensuu started, during the academic year 1969/70, by providing mainly supplementary education for teachers.

academic institution of higher education. Thus the more even distribution of students will necessarily take place in the framework of absolute recruitment areas.

The results give evidence of the strong tendency of institutions of higher education to form areas of influence, but they also show that, because of location as well as the size and educational opportunities offered by the various institutions of higher education, no nation-wide network of influence areas has been developed. If the situation is compared with the results of the study of the Economic Research Institute concerning the general system of influence areas, it becomes evident that only the influence area of the University of Oulu coincides with the regional influence area. On the other hand, for instance, the relative recruitment areas of the Helsinki institutions of higher education do not consist only of southern Finland, but, in addition to the province of Uusimaa, those areas of eastern and western Finland in which the supply of higher education is, at least so far, inadequate.

II. THE INSTITUTIONS OF HIGHER EDUCATION AND THE REGIONAL NEED FOR EDUCATION

1. THE CONCEPTS AND THE PROBLEM

Several definitions and indicators of standard of living and quality of living have been developed. In all these definitions education is usually included as a factor.

In assessing the social importance of education, different groups of scholars have found different results, which can be roughly presented by the following figure:

Figure 2

THE IMPORTANCE OF EDUCATION TO THE COMMUNITY AND INDIVIDUAL

		Role of education	
		active	passive
Level of Approach	community	investment	expenditure
	individual	resource	privilege (or encumbrance)

If education is regarded as a factor which actively contributes to the development of the community, it represents an investment for the community - investment in a wide and not only economic sense - which promotes material and intellectual development, and is a resource for the individual, which may be used to improve the standard and quality of living. If, on the other hand, education is regarded as a passive "stamp" on the prevailing situation, it represents an expenditure for the community and a privilege - or in some cases an encumbrance - for the individual, determined by his social position.

In educational research and planning the quantitative need for education has been considered mainly from three points of view: demand for education, manpower requirements and the productivity of educational investment. Estimations of educational demand have generally been based on population size and its willingness to receive education. Often, however, demand for education is determined by the educational structure itself, the resources and limitations governing access to education, and by educational policies concerning the supply of education. Several methods have been used to assess the need for educated manpower. One of the methods, which has also been used in Finland, is based on a calculation of the number of employees with a certain level of education in each economic sector and on a projection of these calculations according to prospective economic development. The productivity of educational investment has been assessed by, inter alia, cost-benefit analysis. In fact, it is often impossible to base the quantitative assessment on educational needs. Instead, it is based on educational demand, i.e. demand for education, on the one hand, and demand for educated manpower, on the other.(1) Therefore, this study is also, for its empirical part, concerned with the demand for higher education and demand for highly-educated manpower. In assessing the results, it should be noted that educational needs and educational demand are not always in harmony with each other. For instance, the stratification and class structure of society may prevent the educational demand from meeting educational needs, and, on the other hand, the esteem for education may cause the demand to exceed the need for education. In respect of the demand for education, changes which the expansion of the system of higher education have caused in access to education and the recruitment basis of students have been analysed. In respect of the demand for manpower, analysis has been concentrated on the placement in the labour market of university graduates and the changes in it. Thus the empirical analysis only deals with one aspect of the regional educational demand, and is linked with the educational needs mainly through the conceptual analysis presented above.

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1) Educational demand and demand for education are not synonymous in this context. Educational demand is used as a general concept, with demand for education and demand for educated manpower as subconcepts.

The regional part of the analysis is based, except for the differences between the various regions and the corresponding differences in their educational needs, on former observations concerning the influence of higher education institutions on the regional educational structure, and on the results to be presented later concerning the tendency of graduates to seek employment in the environment of the university. The concept of region is used, on the one hand, as a "homogeneous" unit, i.e. the regional division is the same as the division into provinces, or, on the other hand, as an internally differentiated unit, which means that the regional division is based on differences in the degree of industrialisation and the size of the centres. The educational and regional aspects are most clearly linked in respect of regional differentiation with the need and demand for higher education. The placement of young people in education and, after graduation, in the labour market, are, in fact, two different phases of the same process. Through this process young people move from their homes and educational environments to vocations and new environments. Because the institutions of higher education - like vocational institutions on the whole - produce manpower mainly for the expanding trade and vocational sectors, they also direct the regional placement of the graduates. This does not always mean an increase in mobility from, say, the developing regions to the industrialised ones. An institution of higher education in a developing region may, in certain conditions, direct the placement of graduates inside the region. The conditions, again, can be derived from factors influencing the amount and distribution of employment opportunities, such as the structure and trends of the labour market, the regional economic structure, the degree of development in the trades and technology, and the tendency toward centre formation - in short, the internal differentiation of the region.

2. DEMAND FOR HIGHER EDUCATION

The dependence of access to education upon the supply of education

The regional expansion of the system of higher education aims at levelling the regional differences in access to education. The focal point is whether the equalisation of educational supply has actually contributed(1) to the equalisation of access to education. The situation is presented in Table 3. The table requires a few explanatory remarks:

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1) In fact, an accurate analysis of cause and effect would normally call for adequate experimental research. In this connection we deal only with mutual connection.

Table 3

UNIVERSITY ENTRANTS BY PROVINCE IN 1960, 1970 and 1974

	Proportion of students passing the matriculation exam who enter university in the same year(1)		Proportion of students entering university from average age group of 17-19 year-olds		
Province of	1970	1974	1960	1970	1974
Uusimaa	49.1	56.6	11.6	14.8	19.3
Turku and Pori	54.9	55.5	8.8	11.6	15.7
Ahvenanmaa	77.8	74.2	3.3	6.6	7.5
Häme	49.5	50.8	7.3	11.4	14.8
Kymi	44.0	43.7	6.5	8.6	11.9
Mikkeli	45.9	48.1	5.3	7.8	11.9
North Karelia	53.7	60.5	4.9	9.2	13.6
Kuopio	49.8	51.4	6.7	8.5	13.4
Central Finland	53.8	57.1	6.4	12.2	14.6
Vaasa	47.2	52.0	7.1	8.9	13.9
Oulu	47.8	51.6	5.3	9.0	12.8
Lappi	45.0	47.9	4.8	7.5	11.0
The whole country	50.0	53.5	8.1	10.8	15.0
Mean of provinces	51.5	54.1	6.5	9.7	13.4
Standard deviation of provinces	9.0	7.8	2.2	2.4	2.8

1) Distribution of students by province in 1960 is not available. For 1974, the figures used are those from 1973, because there are no centralised statistics on the distribution of students by province, which has therefore been specially calculated by the Matriculation Examination Board at a time when information on students passing the matriculation examination in the autumn of 1974 was still lacking.

In 1960, the province of Uusimaa and that of Turku and Pori were the only provinces in which the proportion of young people entering university was larger than the national average. In 1970, the provinces of Central Finland and Häme had also reached the national average, in addition to the two above-mentioned provinces. The rates of the provinces of Oulu and North Karelia are small in the 1960 statistics, but by 1970 and 1974 they had risen considerably. The changes are thus clearly connected with the development of the universities of Jyväskylä and Tampere and the establishment and development of the universities of Oulu and Joensuu. Moreover, it may be noted that, in addition to Ahvenanmaa(1), in the provinces

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1) The good opportunity of the students of Ahvenanmaa, as well as North Karelia, to find access to higher education is due to the rates of students passing the matriculation examination which are the lowest in the country: in 1974, only 10 per cent of the age group in Ahvenanmaa, and 22 per cent of that in North Karelia, passed the matriculation examination, while the national average was 28 per cent.

of Lappi, Mikkeli and Kymi the proportion of students in higher education was conspicuously small in 1974. These provinces either have no institution of higher education at all (the provinces of Lappi and Mikkeli) or only a small and specialised institution of higher education (province of Kymi). In general the differences between the various provinces have not, however, grown smaller, but rather a little larger, which is partly due to the exceptional position of Ahvenanmaa and the difference in its education system, already present in upper secondary education.

The conclusion is evident. Access to higher education depends on the supply of education. Consequently, the regional expansion of the system of higher education has raised student numbers in regions where institutions of higher education have been established or enlarged. Former results have also shown that, logically enough, the choice of the field of study is largely determined by the supply. Another conclusion is the fact that the influence of a unit of higher education in the present system of higher education does not considerably exceed the area of the province in which it is situated.

The recruitment basis of students

If education is regarded as a resource for the acquisition of well-being, it is not enough to consider access to education merely in terms of quantity. It is also necessary to consider the distribution of education among the various groups of population - to acquire information on the social selectivity of education. The results of the sub-project concerning the social structure and the changes in the student body can be summarised as follows:

- the student body in the Finnish system of higher education is proportionately larger than in most other countries in Western Europe, although the higher strata of society are better represented than the lower ones;
- with due regard to the above-mentioned general bias, it may be noted that the social structure of the student body recruited by an institution of higher education is roughly the same as that of the population in the surrounding areas;
- a considerable number of students come from families which are engaged in agriculture or forestry, and from rural municipalities and sparsely-populated regions;
- the overall social structure of the student body has been slightly equalised during the recent years.

The results indicate that the regional expansion of the higher education system has contributed to a more equitable recruitment of students. The verification of the conclusion requires, however, an answer to the question, whether the same would have happened through the development of the existing institutions of higher education, together with the rise in the population's standard of living and level of education. The influence of factors connected with the economic position of students should be examined. A valid conclusion is thus hardly possible. However, the results provide at least one clue: the proportion of students with rural and agricultural backgrounds is considerable. It can be partly ascribed to the predominant position of agriculture in the economic structure until recently. This explanation is not, however, sufficient, since the proportion of students with an agricultural background has increased during the latter part of the 1960s - simultaneously with the reduction of population in agriculture - and it is thus more representative than, for instance, the proportion of students with industrial background. The result is rather connected with the change in the social structure and the regional differentiation: while the economic and regional structure changes, part of the population is channelled from the regions where the population is decreasing and the role of trades diminishing, e.g. through higher education, to other industries and regions. The role of the education system is also reflected by the fact that during the past decade the proportion of the vocationally-trained labour force has increased most in those sectors of economy which have expanded most during the structural change.

The regional equalisation of educational opportunities

Besides equal opportunities, educational equality seems to require the educational decisions and teaching methods necessary to promote the realisation of those opportunities. Several studies have shown that educational equality - if it can be separated from social equality as a whole - cannot be reached through educational policies alone. At the regional level, the effects of increasing educational opportunities may be of little consequence, because of the mobility of population and knowledge. Examination of the regional differences in educational opportunity only covers a small part of the total problem of regional educational equality. The regional equalisation of educational opportunity can, however, be considered as an important prerequisite for educational equality and the potential of education for promoting a more even regional development.

There are great differences in the regional supply of higher education (Table 1), which are reflected as differences in access to higher education (Tables 2 and 3). Equal opportunity of access to higher education - defined as a distribution of places for students according to the distribution of the population - has officially been presented as a target for the development of the higher education system. Demand for education would hardly constitute a problem in the equalisation of educational opportunity, as it has been proved that demand and access to education are mostly dependent on the supply of education. What is more problematic is higher education as a proportion of the total amount of vocational education and its relation to other educational levels. Another question is which educational fields should be available in each region and in what proportion? This question will be considered later on. However, some observations can be made here.

Comparative international studies have shown that there is a certain correspondence between educational growth and the stage of development of society - which has generally been calculated in terms of economic growth. First, the correspondence concerns the level of education: at the "lowest" stage of social development, growth generally takes place in basic education, at the next stage on the secondary level, and at the "highest" stage in higher education, assuming of course, that at each stage education growth at the lower levels and the corresponding social development have taken place.(1) Second, a certain correspondence seems to prevail between social development and the educational fields: at the "lowest" stage is the growth of both vocational and vocationally-undifferentiated education, at the next stage that of vocation, and at the "highest" stage that of vocationally-undifferentiated education correlates with economic growth and social development. The transferability of the results to another regional level is problematic, though a Finnish study supports this transferability. Besides, it should be remembered that the results concern past developments and that they cannot therefore be simply applied to the future. However, some indications for the regional development of the Finnish education system may perhaps be drawn from the results: first, the development of the Finnish society as a whole is at a stage where the development of higher education essentially influences the social and regional development, but second, the development of higher education should be preceded and supported by the development of secondary education and, especially, secondary vocational education.

The methods of promoting equality of educational opportunity depend largely on the possible growth of the higher education system in the coming years and on the speed of this growth. In the context of a *growing system of higher education*, methods of equalising educational opportunity are more numerous than in a system of the present size, although the nature of higher education and of the units of higher education imposes certain prerequisites. In *a higher-education system of the present size* equalisation would mean equalising the measures and structural changes inside the system of higher education.

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1) The results are based on the hierarchical nature of the education system and the idea of "social development" as a linear and measurable quantity, whose justification has not been questioned in these studies.

3. DEMAND FOR HIGHLY-EDUCATED MANPOWER

The connection between demand and supply

A central feature of the labour market is the fact that the labour force demand and supply are, at least in the long term, constantly being adjusted to each other, although not always successfully. The adjustment happens through changes in the structure of vocations, changes in salaries, and through the mutual substitution of the factors of production. The results of the sub-project concerning the regional placement of university graduates referred to the connection between demand and supply, and showed:

- that university graduates find employment largely in the vicinity of their respective universities, either in the province or the city in which the university is located;
- that there are differences in the educational reserves from region to region according to the regional differences in the supply of higher education; there are differences even after the standardization of regional development and economic structure (Table 4).

The placement of university graduates in the vicinity of the university may be mainly due to the fact that, apart from the supply, these regions have had work available for university graduates, even if it includes jobs which were formerly held by non-academic or unqualified persons. On the other hand, the regional differences in the structure of educational reserves show that the ability of a university to direct the placement of labour force does not completely disappear even when demand is satisfied. Thus a strong expansion of the higher education system could mean the breaking down of the traditional links between vocation and income, which would, at least initially, happen at the expense of non-academic labour force.

Dependence of demand on the economic and regional structure

The study concerning the placement of university graduates came, both theoretically and empirically, to the conclusion that demand for highly-educated manpower is greatest in technologically-advanced industries as well as in the industrialised regions and large centres. Economic structure and centre-formation in themselves cannot naturally account for the need and demand for highly-educated manpower. For that purpose, it would be necessary to analyse the factors influencing the economic structure and centre-formation, especially the interaction between technological and economic development. Economic structure and centre-formation can, however, be used as indicators of the social and regional development on which the demand for highly-educated manpower depends.

Table 4

THE PLACEMENT OF UNIVERSITY GRADUATES BY PROVINCE
FROM A CENSUS AND A SURVEY CONCERNING FOUR UNIVERSITIES

(%)

	The 1979 census: University graduates(1)	Survey of the placement of students			
		University of Oulu	University of Joensuu	Vaasa School of Economics	University of Tampere
Uusimaa	49	12	5	37	29
Turku & Pori	13	3	2	5	8
Ahvenanmaa	1	-	-	-	-
Häme	11	3	3	7	33
Kymi	5	1	16	4	5
Mikkeli	2	0	6	2	3
North Karelia	2	2	53	1	3
Kuopio	3	4	9	3	3
Central Finland	4	3	2	4	3
Vaasa	5	6	-	23	5
Oulu	5	56	3	6	5
Lappi	2	9	2	3	2
Other (abroad)	-	0	-	4	1
Total	100	100	100	100	100
	93,598	429	64	199	454

1) A university graduate is a person with at least a Bachelor's degree.

A study based on economic structure and regional development showed that university graduates could be placed into three "ideal groups" according to their regional placement. Graduates in fields connected with industry and commerce, such as technology and economics, mostly settled in the industrialised regions. Graduates in fields connected with the basic social services, such as teaching, social work and health care, settled for the most part in the vicinity of the university, obviously because employment in these fields is distributed according to the distribution of the population, also in the industrially developing regions. A middle position is taken by graduates in fields connected mainly with public administration, such as the social sciences, who settled both in the industrialised and the developing regions, mainly according to the State administration system.

A study based on the aspects of centre formation and regional structure showed that university graduates tend to move to certain regions and centres of the country. The most attractive region is that of the capital and the city itself, Helsinki. Nearly half of the population with an academic degree lives in Helsinki or the surrounding areas, and those who have taken their degree elsewhere in the country also tend to move there, particularly if there is no work available in the vicinity of their respective universities or if the geographical and social distance between the university town and Helsinki is relatively short. The second important choice - or, according to the survey, often the first - is the vicinity of the university, the province or especially the town in which the university is located.

Thus the labour force with higher education tends to aggregate in certain regions, and this is due, apart from the uneven economic and social development from region to region, also to the regional supply of higher education. The tendency of the graduates to seek employment in the vicinity of the university - i.e. the home area - can also be explained by the welfare theory: the fulfilment of the need for a sense of community, which is part of welfare, depends largely on the membership of a certain local community.

The conditions and possibilities of regional equalisation

Results concerning the tendency of the demand and supply of a highly-educated labour force to adjust to each other and that of the graduates to seek employment in the near vicinity of the university show - despite the doubts presented earlier in this study - that, through the equalisation of educational opportunity, it is to some extent possible to reduce the regional disparities in the distribution of the academically trained population. Even the present capacity, with the recently established and enlarged institutions of higher education, may be enough to diminish the relative differences between regions. On the other hand, the absolute differences cannot be reduced by the present supply of higher education; in fact, the effect may be quite the contrary. In this respect, the possibilities of equalisation and the methods available depend on a nation-wide expansion of the higher education system. According to a Finnish study, a higher education system of the present size will meet the national demand for academically-trained labour force until 1980. Although this forecast contains the weaknesses of the so-called labour-force method and of trend forecasts in general, the results are indicative of the fact that if the present degree-vocation relation is preserved(1) and if economic development continues without any unforeseen rise, the demand for academically trained labour force will not require a nation-wide expansion of the higher education system. On the other hand, universities outside southern Finland are not, at the present scale of activity, able to fulfil the regional demand for academically trained labour force.

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1) E.g., the substitution between different fields and levels of education is then considered as constant.

Which fields of study should be given priority in higher education provided by the less developed parts of Finland is a question which might be better answered in the light of the findings concerning the placement of university graduates. According to them, those who find employment in basic social services, or public services in general, remain more frequently in the vicinity of the university. Since there are significant differences in the regional distribution of services, and since the service sector is economically the most expansive, it would seem profitable to expand those fields of study which are connected with public services. However, the limits of employment opportunities in this sector are eventually set by the size of a population. Although the development of services is of great importance to each region, its effects on the region's production and labour market can never be the same as those of the more productive sectors of economy. Thus the development of industry and basic production, as well as the educational level of the labour force engaged in these sectors, are "strategically" more important: without their development the service sector cannot be greatly expanded. In these fields, on the other hand, the regional differences are great even in secondary education. The development of services may have an indirect effect on industrial development by strengthening the infrastructure necessary for industrial production.

Apart from the economic structure, the internal development of industries can also contribute to a more even regional distribution of the academically-trained population. For instance, the rapid development of agriculture and forestry will probably increase the need for academically-trained labour force, especially in view of the fact that the greatest regional differences in productivity are in this sector. The tendency towards centralisation in industry and commerce and towards larger enterprises, monopolisation, is accompanied by differentiation of production: different phases of production are placed in different regions and a central administration is created. Those phases of production which need most labour-force and least education are often placed in a developing region, to gain the needed labour force, while the headquarters are in Helsinki. Also the governmental services are increasingly centralised in Helsinki.

Since the need for highly-educated manpower ultimately depends on economic and social development, it is reasonable to consider whether changes which might modify the need and demand for higher education can be expected. One of them might be a shift from extensive to intensive growth, or to an intensive renewal of the means of production by means of scientific and technological advances. Instead of increasing the number of the means of production, the existing ones should be made more effective and versatile. The change can be effected by raising the educational level of the labour force, and by increasing services which would promote a more effective use of the labour force and other means of production.

4. THE NEED FOR RESEARCH AND DEVELOPMENT

The empirical study did not deal with the research activities of the institutions of higher education. However, because research is one of the basic tasks of universities, it should be given some consideration. The flow of information inside a State is naturally much more extensive than the mobility of educated people. Still, research conducted by the universities and scientific knowledge transmitted by them are to some extent regionally conditioned. First, universities in the various parts of the country may be regarded as forming part of an infrastructural pattern of knowledge, analogously with the education pattern. This does not mean that the content of knowledge should be regional. Second, the research activities can be directed towards the special problems of each region. It is characteristic of university research to respond to the challenges of the surrounding community. Therefore it seems reasonable to expect that universities located in the developing regions would study the development problems of their respective regions.

The need for research depends on the overall situation of the region, its natural resources and stage of social development. However, there seem to be two special problem areas of major interest, those of economics and technology. Science is even said to have become a real productive power, as a result of scientific and technological development. However, this characterisation does not apply equally to all sciences and all research. It is mainly research in natural sciences, and, even there, primarily development activities, that can be regarded as productive powers. Another central task of research is connected with culture, in the wide sense of the word. Knowledge acquired through research influences people's ideas and attitudes concerning man and the world.

University research is distributed according to the size and range of disciplines of the institutions of higher education in each region (cf. Table 1). Most research is thus carried out in Helsinki and the surrounding areas. If research expenditure is used as an indicator, it can be noted that about 22 per cent of the total and about 44 per cent of research in the public sector is carried out in the institutions of higher education. The regional equalisation which has taken place in the number of students also applies to research: in 1970, the share of the institutions of higher education in Helsinki was about 55 per cent of the total expenditure of university research, while in 1975, it was about 40 per cent.

Table 5

THE DISTRIBUTION OF RESEARCH AND DEVELOPMENT EXPENDITURE BY PROVINCE IN 1973, AND RESEARCH EXPENDITURE ON HIGHER EDUCATION IN 1975

Research and Development expenditure in 1973

Province	Private enterprise sector	Other private sectors	Public sector	Total
Uusimaa	47.5	81.5	64.9	56.0
Tuurku & Pori	15.4	1.3	9.6	12.5
Ahvenanmaa	0.0	0.0	0.0	0.0
Häme	14.5	9.7	7.8	11.4
Kymi	7.3	0.1	1.3	4.5
Mikkeli	0.9	1.9	0.3	0.7
Kuopio	1.3	-	1.5	1.4
North Karelia	0.3	1.9	0.5	0.4
Vaasa	5.5	0.1	0.8	3.3
Central Finland	2.7	0.3	4.4	3.4
Oulu	3.7	2.9	7.1	5.2
Lappi	0.9	0.3	1.7	1.2
	100	100	100	100
Thousand Finmarks	332,340	15,410	276,470	624,220
Percentage of total	53.2	2.5	44.3	100

Research expenditure in higher education in 1975

	(%)
University of Helsinki	27.4
Helsinki University of Technology	8.9
Helsinki School of Economics	1.9
College of Veterinary Medicine	1.1
Swedish School of Economics	0.9
Swedish School of Social Sciences and Local Administration	0.2
Total	40.4
University of Turku	10.9
Turku School of Economics	0.5
Åbo Akademi	2.7
Åbo Swedish University School of Economics	0.3
Total	14.4
University of Tampere	7.4
Tampere University of Technology	4.2
Total	11.6
University of Oulu	14.2
University of Jyväskylä	8.2
Vaasa School of Economics	0.9
University of Kuopio	4.9
University of Joensuu	4.3
Lappeenranta University of Technology	1.1
Other expenditure	0.1
	100
Thousand Finmarks	211,480

Numerically, the greater part of regionally-oriented research is also carried out in the institution of higher education of Helsinki. However, most of this research consists of Master's theses. Otherwise regional orientation plays no central part in Helsinki and southern Finland institutions of higher education. On the other hand, all the institutions of higher education in the developing areas have separate research institutes whose activities are largely directed toward solving the regional problems.

The need for a regional expansion of Research and Development is quite evident. Apart from the technological, economic and social problems, the cultural tradition of each region offers good opportunities for research. The expansion and development of research pursued in the institutions of higher education are closely connected with the expansion of further education, in which the regional differencos are also great.

III. THE INFLUENCE OF HIGHER EDUCATION POLICIES ON REGIONAL DIFFERENTIATION

One of the objects of this study has been regional differentiation. The roots of regional differentiation are to be found in the basic economic structure of Finnish society. The uneven development of various sectors of production has led to fundamental changes in the economic and regional structure. A great part of the population has moved from basic production to processing as well as service sectors, from developing regions to industrial ones, and from the country to the towns. In this process the education system - together with labour-force policies - has acted as a supervisory and channelling mechanism. Higher education has provided one way for the young people in developing and rural regions to move to the industrial and urban areas.

In recent decades, however, efforts have been made to lay more stress on regional policies. Measures have been taken to support industrial and other enterprises in the developing areas and to strengthen the network of infrastructures and services in these areas. The creation of the educational and higher-education network can be regarded as a part of the latter. The expansion of the higher education system has been accompanied by that of the service sector, comprising education (comprehensive school), health care (public health services) and special services. Thus the new institutions of higher education have been able to channel graduates largely to their own influence areas. Future development in this direction depends on the possibility and scope of regional equalisation in the distribution of production and employment. As the expansion of the service sector is limited by the number and development of the inhabitants, physical output - industry and basic production - is strategically more important in the future. Also the "spin-off" effects of output seem to be greater than those of services.

Economic development and structural change have thus provided the resources for the expansion of the higher-education system. They have also channelled and promoted this development. This connection will probably continue in the future, although the relationship between higher education and social development varies in the different phases of social development. In any case the effectiveness of higher education policy measures depends decisively on their adjustment to other social policy measures and social development on the whole. From the viewpoint of regional development, development goals with some bearing on the strengthening of the higher education network are the following:

- development of technology, economic structure and industries;
- development of regional administration;
- development of folk culture and other cultural activities.

A central regional target in economic development is to increase the range of production structures in the developing regions. Such development would also provide better employment opportunities for highly-educated manpower. If, on the other hand, the aim is to establish a certain regional division of labour in production, the higher-education system should adjust to this development. In regional administration the central issue is the reform of the intermediary level of administration, which will probably increase the need and demand for an academically trained labour force as well as research and development activities at the regional level. There are also signs of the revival of folk culture (and the so-called regional culture). While the above-mentioned prospects are purposely "positive", aiming at levelling out regional differences, it should be borne in mind that alternative developments would mean different development prospects for higher education and the higher education network.

The development prospects of the higher-education network are also influenced by the internal factors of the education system. Their influence is the more important in that the aim of the education reform is to create a more uniform education system. As the plans for the reform of the intermediary level of education are still under consideration, it is not possible to forecast their future influence on the higher education system.

Finally, a few remarks on the present situation. The results of the study show the following facts:

i) There are considerable regional differences in the supply of higher education. However, the establishment and development of institutions of higher education in the 1960s and 1970s has to some extent levelled off the regional differences in access to education. It is reasonable to expect that the same development will continue while the higher education system is further expanded. The only limiting factor is the number of people with qualifications for higher education;

ii) In the distribution of research and development, regional disparities are large, and the need to even out these differences by extending research in the developing regions is evident;

iii) A large number of academically-trained people live in the industrially-developed regions, particularly near Helsinki. As graduates, on the other hand, tend to settle in the vicinity of the university which they have attended, it would seem possible to even out the regional differences by expanding the higher-education system. The demand for academically-trained labour force is not, however, great enough to justify a national expansion of the higher education system in the near future, and the regional equalisation would thus be realised by decentralising the existing capacity of higher education;

iv) It would be possible to improve the higher-education network by introducing new models of higher education (such as the sub-university and regional college). It would, however, greatly change the Finnish system of higher education by creating new institutions of higher education whose research capacity and structural qualities on the whole would be very different; a development which is generally opposed in Finland.

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Appendix

A SHORT PRESENTATION OF THE SUB-STUDIES

I. THE INFLUENCE OF A UNIVERSITY ON ITS ENVIRONMENT: THE PLANNED REPORT

The planning report of the research project entitled "University and its Environment" started by considering the regional problems of higher education in Finland and some other European countries. The outline of the research problem was based on two premises. First, that higher education is a resource factor in raising the population's standard of living and, second, that there is interaction between the university and its environment. The forms of interaction are the effects on the labour market, information, economy, culture and politics. This grouping was applied to the plan for basic statistical information to be used in the project. The institutions of higher education chosen for the empirical study were the University of Oulu, the University of Joensuu, the Vaasa School of Economics and the University of Tampere. The choice was subject to two considerations: on the one hand, the aim was to have a clearly-defined object of study, on the other, the study was to include different institutions of higher education located in different regions. The environment of the university was taken to mean the area of influence, i.e. the area unit, between the State and the university town, with which the university has a functional connection.

Consideration was also given to the relationship between the university and the social development of its environment with the conclusion that, at this stage of social development, higher education is most closely connected with the structural change in society. The main problem was to decide to what extent the universities of various regions are able to channel the structural change inside the region, and to what extent they will adjust to the general trend of the structural change and direct resources from the developing regions to the industrially-developed ones.

It should be noted that the planning report was a general outline for the research project itself, and it was not applied to the research reports presented later in the text, except for the part on "labour force influences". On the other hand, the connection between higher education and the structural change of society was a very important consideration in all the sub-projects.

II. THE RECRUITMENT OF STUDENTS IN HIGHER EDUCATION

The study was a survey covering the students of four institutions of higher education and its approach was strongly exploratory - thus it was a kind of preparatory study. The results were based on direct percentages. Apart from its task as a survey, presented in the planning report, the study appears to have been influenced by studies dealing with the social selectivity of education and, in particular, with the regional accessibility of education.

The results showed that a considerable number of the students of each institution of higher education came from the province in which the institution was located or from the neighbouring provinces. Often the students themselves mentioned the nearness of the institution of higher education as one of the reasons for seeking admission to it. Although the students remarkably often gave the "opportunity to receive training for a specific vocation" as the main reason for choosing a particular institution of higher education, they, in fact, had sought admission in the same institution perhaps to several different faculties. The regional and social bases for the recruitment of students were closely connected, for the social structure of the student body was remarkably similar to that of tne region's population.

The study also gave an impetus for further research with the object of defining the recruitment areas of all the institutions of higher education in Finland.

III. THE RECRUITMENT AREAS OF THE INSTITUTIONS OF HIGHER EDUCATION IN FINLAND

The study aimed at defining the recruitment areas of institutions of higher education using the province as the smallest unit. The study was influenced, not only by the preceding research report but also by functional region-oriented research. The material used consisted of statistics from the spring term of 1974, which were collected by direct enquiries, and the existing statistics on the academic year 1960/61 and the autumn term of 1970.

After a short historical survey, the study presented the regional distribution of students' home provinces by university and by university group. The results gave evidence for the tendency of institutions of higher education to have special recruitment areas of their own. The actual recruitment areas of the institutions of higher education were then studied more closely, as well as the question as to what extent the tendency has created a national network of recruitment areas. For the purposes of the analysis, such concepts as the relative recruitment area were introduced, and the final conclusion was that a network of recruitment areas which would cover the whole country does not exist as yet. Among other things this is because of the differences in size between various institutions of higher education. As the study did not take direct account of the different fields of study, the next task was to find out if the demand for and access to education are regionally conditioned by the range of disciplines offered by each institution of higher education. The answer was affirmative. It thus gave evidence for the general validity and strength of the trend towards recruitment areas. Finally, the study was extended to comprise the regional differences in the demand for and access to higher education, as well as changes in them, by comparing the numbers of university entrants from different provinces with those of school leavers passing the matriculation examination in the same provinces during the same year. The results showed that the regional differences and the changes in them are linked to the expansion of the higher-education system.

IV. THE REGIONAL PLACEMENT OF UNIVERSITY GRADUATES IN FINLAND

The theoretic starting-point of the study was the connection between higher education and the change in the structure of society. Higher education was supposed to act as a mechanism following and channelling the structural change and thus in part directing the placement of the population. As it was reasonable to think that the demand for highly-educated manpower would be greatest in the industrially-developed regions, and particularly in the large centres, it followed naturally that the university graduates would seek employment principally in southern Finland and the metropolitan area.

On the other hand, the student survey already gave evidence of the desire of students to settle, after graduation, in the vicinity of the university, i.e. their home region. The opportunities for further study offered by the university could be supposed to strengthen this desire. It was thought that the employment prospects of graduates could be deduced from the economic structure, the stage of industrial development and the centre-formation. It was also supposed that by grouping the fields of study according to the corresponding sector of the economy, conclusions could be drawn as to the future regional placement of graduates. The main conclusion was that graduates qualified for the basic social services would have the best opportunities to find employment in the vicinity of the university in the developing regions. Another consideration was, however, that the mutual adjustment of the supply and demand of manpower, e.g. through substitution, would generally improve the possibilities of finding work near the university. Those who find employment in the areas surrounding the university were thought to move mostly to the large centres, above all the university town.

The study was based on the educational statistics of the 1970 census and a questionnaire concerning the regional and vocational placement of students graduating from the aforementioned four institutions of higher education during the years 1969-73.

An analysis of the statistics of the 1970 census gave evidence for the assumed tendency of graduates to gather in the industrially-developed regions and the large centres. Nearly half of the academically-trained population lived in the province of Uusimaa, mainly in the metropolitan area. The results also suggested that the placement of graduates might have some connection with the development of the higher education network and, consequently, with the regional supply of highly-educated manpower.

At the beginning of the survey, a setting was provided which would enable an empirical study of the supposed connection between higher education and structural change to be made. The results supported the hypothesis: a large number of the graduates were from families engaged in agriculture, and most of them moved to regions which were more industrialised and urbanised than their home regions. A considerable part (33-56 per cent) of the graduates came to live in the province in which the university was located; this applied particularly to graduates qualified for the basic social services. However, the mobility of graduates from all these four institutions of higher education was in favour of the province of Uusimaa (the metropolitan area). On the other hand, the greater part (47-68 per cent) of those staying in the province in which the university was located took up residence in the university town. Taken as a whole, the results thus supported the tentative hypotheses. However, the study material did not enable an analysis to be made of, for instance, the hypothesis of substitution, or that of "explanatory" or "intervening" factors in general.

Résumé du rapport technique n° 9

L'UNIVERSITE ET SON ENVIRONNEMENT
L'EXPERIENCE FINLANDAISE

par

Dr. A. Antikainen

L'objet de cette étude est d'identifier et d'examiner les facteurs qui sont entrés en jeu dans la formation du réseau d'établissements d'enseignement supérieur en Finlande, en particulier sous l'aspect régional. Contrairement à d'autres niveaux d'éducation, le nombre des étudiants de l'enseignement supérieur était très élevé dès le début du siècle. La seconde vague importante d'expansion de cet enseignement se produisit au cours des décennies 1960 et 1970. Cette expansion, dérivée de demandes effectives et politiques plus que de facteurs liés à l'économie de marché, a largement pris un caractère régional. De nouveaux établissements d'enseignement supérieur ont été créés dans diverses parties du pays, entre autres à Vaasa et Joensuu, tandis que l'on s'est efforcé de freiner la croissance des inscriptions dans les universités d'Helsinki et Turku. Cependant, on n'a pas toujours accordé une attention suffisante à la gamme des études offertes dans les nouveaux établissements régionaux : la possibilité d'accéder à une université ne représente pas nécessairement en soi une égalité des possibilités d'éducation. Bien que, traditionnellement, Helsinki et Turku attirent un fort pourcentage de l'ensemble des étudiants universitaires de Finlande (67,6 % actuellement), leurs zones relatives de recrutement ont diminué pendant les décennies 1960 et 1970. Aujourd'hui, la plupart des étudiants des établissements d'enseignement supérieur sont originaires de la province où ceux-ci sont implantés ; ceci illustre la forte tendance des établissements supérieurs à devenir des zones d'influence. Cependant, sauf dans le cas d'Oulu, cette zone d'influence ne correspond pas exactement avec celle du centre municipal où l'établissement est situé.

BESOINS REGIONAUX D'EDUCATION

En Finlande, les besoins quantitatifs d'éducation ont été considérés essentiellement sous trois aspects : la demande d'éducation, la productivité de l'investissement que représente l'éducation, et les besoins en main-d'oeuvre. Les estimations de la demande d'éducation ont été généralement basées sur le chiffre de la population et sa propension à étudier. La productivité de l'enseignement en tant qu'investissement a été estimée par une analyse de type coût-avantages et les besoins en main-d'oeuvre qualifiée en calculant les quotients de main-d'oeuvre par niveau d'éducation dans chaque secteur économique au prorata de la part de celui-ci dans le produit national brut. Il convient de noter que les besoins et les demandes d'éducation n'évoluent pas toujours en harmonie réciproque ; ainsi, la structure sociale peut empêcher la demande d'éducation de coïncider avec les besoins en qualifications, tandis que l'engouement pour certains enseignements peut entraîner un excès de la demande par rapport aux besoins.

L'EGALISATION DES CHANCES D'ACCES A L'ENSEIGNEMENT

Une meilleure répartition de l'offre d'éducation a-t-elle contribué effectivement à l'égalisation des chances d'accès à l'enseignement? La régionalisation du système d'enseignement supérieur a certes accru le nombre d'étudiants là où des établissements ont été implantés ou développés. En outre, bien que les classes sociales supérieures soient mieux représentées que les autres, on peut observer un léger progrès vers une structure sociale plus égalitaire de la population étudiante au cours des dernières années. En particulier, la proportion des étudiants d'origine rurale ou agricole est très grande, bien que la classe agricole se soit réduite. Il semble donc qu'une régionalisation plus poussée de l'enseignement supérieur soit essentielle pour égaliser les possibilités d'éducation ; l'accès aux études dépend très largement de l'offre d'enseignement.

PLACEMENT DES DIPLOMES

Les étudiants qui ont reçu leur diplôme dans des domaines liés à l'industrie et au commerce, par exemple en technologie et en économie, se sont surtout établis dans la partie industrialisée du pays, en particulier la région d'Helsinki, où vit la moitié de la population titulaire d'un diplôme universitaire. Ceux qui ont leur diplôme dans des domaines liés aux services sociaux fondamentaux, tels que l'enseignement, l'aide sociale ou la santé, se sont installés pour la plupart à proximité des universités. L'emploi dans le secteur des services dépend cependant de la répartition de la population ; aussi le développement de l'industrie et de la production de base est-il important pour ces villes et régions universitaires car, sans lui, le secteur des services ne peut guère s'étendre. Quant à ceux qui ont des diplômes dans des domaines liés surtout aux tâches administratives, comme les sciences sociales, ils se sont installés tant dans les régions industrialisées que dans les régions en développement, essentiellement en fonction du système administratif national.

BESOINS EN ACTIVITES DE RECHERCHE

En plus des domaines technique, économique et social, c'est essentiellement en matière de développement régional qu'existent les plus grands besoins de recherche au sein des établissements d'enseignement supérieur. C'est notamment le cas en ce qui concerne les traditions culturelles de chaque région.

INFLUENCE DES POLITIQUES D'ENSEIGNEMENT SUPERIEUR SUR LES DIFFERENCIATIONS REGIONALES

En Finlande, c'est le développement économique et le changement des structures qui ont fourni les ressources nécessaires pour l'expansion de l'enseignement supérieur. Cette expansion n'est qu'un aspect de la croissance du secteur des services, qui comprend l'éducation, la santé et les services sociaux. Aussi les nouveaux établissements supérieurs ont-ils su retenir dans leur environnement une grande proportion (de 33 à 56 %) de leurs diplômés. Mais pour que cette tendance se renforce à l'avenir, il faudrait pouvoir répartir plus équitablement la production et l'emploi entre les régions. Aussi l'efficacité des mesures de la politique d'enseignement supérieur dépend-elle inévitablement de leur ajustement au développement régional dans son ensemble tout en subissant l'influence des facteurs internes du système éducatif. Actuellement, cependant, c'est une décentralisation de la région d'Helsinki qui est souhaitable plutôt qu'une nouvelle expansion du système régional d'enseignement supérieur, car celle-ci ne serait pas justifiée par l'offre actuelle d'emplois de niveau universitaire.

Part Four

PLANNING AND ORGANISATIONAL ISSUES

Quatrième Partie

QUESTIONS DE PLANIFICATION ET D'ORGANISATION

Technical Report No. 10

REGIONAL AND LOCAL DECENTRALISATION OF DECISION-MAKING IN EDUCATIONAL POLICIES IN NORWAY

by

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I. INTRODUCTION

No point of departure for the Norwegian contribution to this OECD project "Education and Regional Development" could be more suitable than the findings of the group of OECD examiners who visited Norway from 23rd August to 8th September, 1974. The report, published in 1976, gives an overall review of the national policies for education in the country, mainly concentrated in four major problem areas:

- Participation in educational decision-making;
- Educational policies for equality;
- Integration in post-compulsory education;
- Innovation and planning policies.

These problem areas are of course quite interwoven and cannot easily be separated. However, the first one must be considered as more relevant in the current context than the other three on which more general information is given in the OECD Examiners' Report. The current contribution represents an effort to develop the first point somewhat further. The discussion falls naturally into two parts. The first involves the effort now being made to decentralise decision-making more generally, and the reasons for this. In the second, it will be seen how this effort affects education and particularly higher education.

A finding of the OECD examiners was:

> "Education in Norway is involved in a general problem of Norwegian society: How to reconcile strong central authority developed to implement Norwegian social objectives with the increased local autonomy seen in Norway as the next essential step for the further development of such objectives? How will policies for education in Norway meet this dilemma?"(1)

To which a Norwegian response could be:

> "An effort is now being made to decentralise decision-making from the national to the regional and local levels. Unlike the Examiners, we do not look upon "Decentralisation from the centre" as a paradox or a dilemma, but as a fairly natural procedure

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1) Reviews of National Policies for Education: Norway. OECD, Paris, 1976, p. 38.

> which will be carried out step by step. To a great extent decentralisation measures are taken in response to initiatives taken at regional and local levels. The real dilemma is how to avoid other centrally placed professional associations, groups of experts, or government agencies moving in to fill a temporary vacuum."

The examiners, as well as the Norwegian delegates, were thus aware of the conflict between decentralisation policies and the maintenance of equality. The differences of opinion about the chances of success or the possibilities of failure of such a "centralised" move towards decentralisation of decision-making also appear quite clearly. Could the gap be filled if more of the basic material had been available at the time of the examination and presented to the OECD group at an early stage? This question may be borne in mind when the issue is further discussed.

A Norwegian debate based on several premises

After the OECD examination the basis for discussion of the big issues of a policy of decentralisation of decision-making on a general level was greatly extended. The work done, or still being done, in three Royal Commissions has greatly contributed to this. One is a commission which had as its mandate to describe the living conditions of the Norwegian people and to analyse the variations found (The Rødseth Commission). Another is a commission set up to investigate the current power structures (The Hernes Commission). The third one (The Juel Commission) has been set up to co-ordinate and prepare the necessary administrative reforms of the regional and local administrations.

II. THE LIVING CONDITIONS OF THE NORWEGIAN PEOPLE

The Rødseth Commission was appointed in 1972 and presented its final report in May 1976. ("Levekårsundersøkelsen.")(1) Three of its main aspects will be discussed briefly here. A discussion seems particularly relevant in connection with the terms equality, political resources, and regional imbalance. Equality is, as already

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1) Levekårsundersøkelsen, sluttrapport (The Living Conditions of the Norwegian People, Final Report). Universitetsforlaget, NOU 1976: 28.

indicated, a major political target; political resources are a means to achieve it, and regional imbalance is a geographical and political reality of great impact. All are fundamental elements to consider in connection with an evaluation of a drive towards a more decentralised process of decision-making.

The Rødseth Commission introduces four categories of equality:

- formal equality,
- equality of treatment,
- equality of competence,
- equality of result.

A policy of formal equality (for instance vis-à-vis regions of local communities) is a policy of formal non-discrimination. An example taken from the educational sector may illustrate the real consequences of such a policy.

In principle, admission to secondary education has been open to all applicants. However, it is true that the number of study places has always been too limited to meet demand, and they have been allocated rather unequally among the various regions and municipalities according to their financial position and political power. To the individual, his personal means, or rather his family's, has often been an effective barrier to further education as long as educational and school material were not free and an additional job might be necessary to support the family. There has, however, been little correlation between the extent to which applicants have been rejected and the economic conditions of the country.

Formal equality thus tends to mean that regions, local communities and individuals with resources above the average, in practice, receive preferential treatment. Since this is now widely recognised in Norwegian society there is a move towards more advanced concepts of equality. One of these is equality of treatment.

Equality of treatment is active in the sense that the same resources are spent on everybody in the same category regardless of where they live and of family resources. A system of supportive measures is then introduced.

If the same amount of money is made available to each pupil or student it is believed that talent, not family background, will prove the significant factor. Nevertheless, equal treatment of unequal youngsters (in the sense that they have unequal family resources to support them) is not real equality. On the contrary, such treatment may reinforce inequalities. It is also true that support according to competence and achievement, is discriminating in this sense.

Against this background it is not surprising that a certain amount of "positive discrimination" has been applied for decades in Norway. Even if equality of result has never been formally adopted as a political principle, it has been admitted that it may be necessary to discriminate in order to reduce inequality. It is important to stress, however, that this element of "positive discrimination" has been based on geographical criteria, rather than those of family background or class.

In order to trace and act upon local requirements it may be of vital importance to decentralise the level of decision-making.

It is a matter of political priority how far one can go to create equal opportunities for everybody, for instance in the field of education. To establish a minimum educational level and provide the means necessary to achieve the minimum requirements, is thought to be the first step towards equality. The central government has encouraged this by subsidising the school districts with resources below the national average.

"Levekårsundersøkelsen" is an important document in the sense that it throws some light upon the factors that are decisive for the success or failure of pupils and students. The purpose of the investigation is to analyse the mechanisms that produce inequality. It reveals that the level of educational achievement is closely related to social background, or rather that education modifies the effects of all social background factors.

The most important factor is family resources. The student's working conditions at home and the interests and expectations of the parents also play a large part. So does the possibility of using the parents as resource persons. Such advantages tend to accumulate and work collectively in favour of the same students. They favour most of the students from the higher income levels. It is exceedingly difficult to compensate for differences in family background.

Private resources of the kind dealt with here are supplemented by the collective resources of friends and of the locality. The affluence of resources in the total environment of these fortunate students serves as an extra stimulus. An uninspiring environment is a corresponding drawback for students from the poorer social strata. There is a gap in motivation which is more decisive during schooling than a certain inherited or milieu-affected difference of talent for learning, because it makes itself felt again and again over the whole school career.

The tendency outlined within the school context is discouraging in itself when the target is to bring about educational equality. It is even more so when taking into consideration the fact that education plays a major part, though more indirectly, in the distribution of benefits and burdens in society at large. The investigation shows that education is also a purveyor of social inequality, since it does not remove all traces of social background. A traditional social structure is characterised by the fact that social resources are transferred directly from parents to their children. A structure of meritocracy implies that resources acquired in the school, together with the intellectual resources, serve as the input of the individual into a job (or job structure) and are converted into status and income. Norwegian society is no doubt a mixture of a traditional and a meritocratic society. Yet much of the inequality in Norway cannot easily be explained by these factors.

A positive aspect of the development described is that the "quantity" of education has increased enormously, both nationally and regionally. This fact opens up perspectives as to how far it is possible to go towards a decentralisation of decision-making inside and outside the field of education. If the regional and local imbalance is very marked, regionalised and localised decision-making may further aggravate the inequality of individuals according to region and to local community inside a region. An important aspect of this is that additional education normally increases the political resources of individuals and groups. Before the problems of regional imbalance and participation are dealt with, five negative and perhaps rather surprising findings of the "Levekårsundersøkelsen" may serve as background information. They are summarised below.

- The difference in educational resources of the various age groups tends to increase with age;
- As does the difference between the various status and income groups;
- And also probably the gap in average educational level between urban and rural districts;
- The difference in the amount of education received among the various educational groups tends to increase in favour of those who have already reached a high level of education;
- Adult education, though contributing in a modest degree to the reduction of differences between the sexes, as far as the quantity of education is concerned, further accentuates the difference between the sexes as to their choice of type of education.

These negative effects are the result of variations in personal experience and qualities, of different possibilities for promotion on the job, and of the job structure of a given community.

Political resources and decision-making

A definition of the term "political resources" could be: The resources individuals, groups, or localities possess and which can be powerful enough to alter (or sometimes consolidate) existing conditions. For the individuals it is a question of whether they affect their scope of choice and determinants for action. Essential factors here, again according to the "Levekårsundersøkelsen", are motivation, ability to express oneself, knowledge of political matters and organisational membership and contact network. Motivation is to be understood in the sense that it is essential to know how interests are affected and to be confident that the situation can be affected through personal involvement. A correlation matrix illustrates the inter-connections among education and six other variables (taken from the "Levekårsundersøkelsen").

Table 1

CORRELATION MATRIX FOR EDUCATION AND OTHER RESOURCE VARIABLES. NORWEGIAN MALES 30 TO 55 YEARS OF AGE

		X^1	X^2	X^3	X^4	X^5	X^6	X^7
Own education	X^1	1.	.643	.465	.329	.350	.170	.113
Own vocational status	X^2		1.	.315	.415	.387	.207	.132
Father's vocational status	X^3			1.	.222	.164	.088	.110
Working conditions	X^4				1.	.165	.125	.148
Ability to control one's own life	X^5					1.	.172	.202
Organisational membership	X^6						1.	.107
Economic resources	X^7							1.

N = 412

X^1 = Education (ys).

X^2 = Own vocational status.

X^3 = Father's vocational status.

X^4 = Index made after factor analysis of answers to questions about stress factors in the work.

X^5 = Index made after factor analysis of answers to questions on ability to control one's own life. (Strong ability = high value).

X^6 = Index made after factor analysis of answers to questions about political party and organisational membership. (High degree of affiliation = high value)

X^7 = Index based on the distribution of answers to a question on the ability to raise N.Kr.5,000 at one week's notice. (Strong economic resources = high value)

In the current context of decision-making, ability to control one's life is of the greatest interest. The inter-connection between this factor and education is not particularly strong (.350), though stronger than the relation between education and all other variables except personal job status. [The slight relation of education to financial resources may to some extent be explained by the special index applied for this. The indicator was a question to a representative selection of individuals as to whether they could raise N.Kr.5,000 (approx. $1,000) at one week's notice. A higher degree of inter-correlation would probably have appeared between this and the other resource variables if a better measure, for example annual income, had been available.]

Other investigations by the "Levekårsundersøkelsen" serve as a basis for the index of control over one's own life. Approximately 58 per cent of a representative selection of men and women in full-time work outside the home, with primary education only, said that they could have no influence whatsoever on political decisions, beyond the effect of their vote. Corresponding figures for individuals with up to three years' additional schooling was 56 per cent, up to six years' 41 per cent, and more than six years approximately 25 per cent. Only 12.6 per cent of the last mentioned category found politics so difficult that they could not acquire enough insight to influence matters. For the category with the shortest formal education this percentage was 51.4. Approximately 14 per cent of the individuals with the shortest education scored inside the highest quartile on the index giving the ability to control their own lives, whereas there were 55.3 per cent of those with the longest formal education in that quartile.

With these figures in view it is not surprising that it is a general Norwegian experience that individuals with an education of more than the average length are represented far beyond their number in all areas of decision-making, although this feature is probably less typical of Norway than of many other countries. These individuals are better fitted to adapt to their environment and to bring about changes in society according to their priorities. As there seems to be strong evidence that the impact, measured in benefits and burdens, of the educational level an individual has attained - relative to social background - is increasing rather than decreasing, inequality of education may be growing more problematic, not less.

Regional and local imbalance

With one-fifth of the population in full-time education and a long tradition of adult education involving a large number of people, Norway has channelled quite formidable resources into the field of education: 15-16 per cent of the total public expenditures, or approximately 7 per cent of GNP, are spent on education and much has been achieved, measured by a conservative standard, in the move towards formal equality. A more radical standard, measuring inequalities yet to be levelled out, reveals the challenges still to be met on the road towards equality of result. This holds true notably for individuals, but for regions and local communities too, and has an impact on the decision-making process at regional and local levels.

For a discussion of regional and local imbalance the country may be divided into five parts or regions. This is the division generally used, for instance in planning inside the health sector. The five regions are Østlandet (with Oslo, 1,959,100 inhabitants), Sørlandet (with Kristiansand, 217,900 inhabitants), Vestlandet (with Stavanger and Bergen, 1,009,000 inhabitants), Trøndelag (with Trondheim, 364,200 inhabitants), and Nord-Norge (with Tromsø and Bodø, 466,700 inhabitants). At a first glance the distribution of educational opportunities may seem fairly even, when the number of study places in secondary school (not primary school) is being considered. Of the 16-19 age group, 60 per cent attended school in Nord-Norge, 66 per cent to 68 per cent in the other four regions, and the number of study places varied from .29 per person (Vestlandet and Nord-Norge) to .33 (Sørlandet). The conclusion is that there is a high degree of equality on these broad criteria. The differences appear when the municipalities are considered according to the extent to which they are urbanised. The Norwegian Bureau of Statistics divides the municipalities into the nine categories which are shown in Table 2.

The figures in Table 2 show the number of study places available in secondary school in 1970 per 1,000 individuals in the 16-19 age group and the number of persons with secondary or higher education per 1,000 individuals aged 15 or over in 1970 and 1960 respectively. The figures reveal significant variations from the most-centralised or urbanised municipalities to the least-centralised agricultural and fishing communities. However a slight positive development took place from 1960 to 1970, and (not appearing in the table) the development up to 1976 has continued at a gradually increasing pace in the same positive direction. It should be added that the figures do not tell how far a young person has to go for his secondary education (first column) or the distance between communities with few educated people and centres with a good supply of well educated potential decision-makers. Normally small societies based on the fishing or agricultural industries will be located at quite a distance from the main service centres. Nord-Norge and Trøndelag in particular have many municipalities in the categories 1 to 4, while Østlandet dominates the more urbanised and centralised categories 7 and 8.

That decisions for the smaller communities are taken in the larger communities may seem undemocratic to the former and be looked upon as a result of undesired guardianship. This is of course bad in itself at a time when participation in decision-making is more than a slogan. Furthermore, such decisions are more often than not made on the basis of national or regional priorities or principles,

Table 2

SECONDARY SCHOOL PLACES AND NUMBER OF PERSONS WITH SECONDARY OR HIGHER EDUCATION ACCORDING TO DIFFERENT MUNICIPAL CATEGORIES

Type of municipality Category 1 - 9	Secondary school places per 1,000 individuals aged 16 - 19	Persons with secondary or higher education per 1,000 individuals	
	1970	1970	1960
7. Highly-centralised combined service and industrial centres	350	193	89
8. Other combined service and industrial centres	510	111	42
6. Centralised industrial centres	240	90	33
5. Less-centralised industrial centres	220	77	27
9. Other municipalities	350	78	24
3. Centralised mixed agricultural and industrial municipalities	180	69	23
2. Less-centralised mixed agricultural and industrial municipalities	180	60	17
1. Agricultural communities	60	58	15
4. Fishing communities	40	45	10

and not always with due regard for the local community. It is not surprising that the demand for well-educated *counter-expertise* is strong. Such demands have been heard in connection with the establishment of the new regionalised system of higher education in this country.

III. POWER STRUCTURES AND STRUCTURAL IMBALANCE

Some important aspects of the centre/periphery debate in Norway concern the contents of these terms. The commission set up to investigate the current power structures (the Hernes Commission) has not yet finished its analysis but the Chairman has published a book(1) which can be looked upon as a basis for further investigation. Among the principal problem areas are those of the concept of power, the causes of power, how positions of power are related to the structure of society, and how power is distributed and executed. An important factor of motivation is probably the need to sort out the imbalances in the distribution of power and their causes, and to prepare the ground for structural reforms rather than for a redistribution of power among individuals.

The Power Model set up by Professor Hernes is based on four fundamental notions: actors, actions, interests and control. In order to exert power one has to be aware of and promote one's interests and, to a certain extent, control actions, resources, issues, etc. Like the American sociologist James S. Coleman, Hernes focuses attention on how actors and actions are knit together, and on how the actors can exchange elements of control between themselves according to their relative preferences. Another very important aspect in the Norwegian context is the degree of factual knowledge which the actors have, the adaptation of this knowledge in a risk-reducing process, and their capacity for further learning. To have power is to control valuable issues; a valuable issue is one which greatly attracts the attention of a number of influential and competitive actors. It takes an expert to come out on top.

The counterpart of the expert is the individual who exerts no influence other than that of his vote. In reality he tends to delegate his potential for decision-making to the actors who take the ultimate decisions. After he has voted, decisions are taken on his

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1) Gudmund Hernes: *Makt og avmakt* (Power and Powerlessness) Universitetsforlaget, 1976.

behalf by organised interests. If the individual does not take an active part in such organisations, he may become powerless. Even as a member he may be powerless because the decisions may be taken centrally while he is in the periphery, literally or figuratively. A fairly recent Norwegian investigation(1) reveals that an individual's capacity for influence is decided by the following five factors in this order: (i) organisational membership, (ii) professional freedom, (iii) education, (iv) financial resources, (v) possibility of personal communication. Indirectly factor (iii), education, affected all the other four factors. Thus to create further educational opportunities in the geographical periphery can be an effective means for transferring political resources to it.

As far as resources other than political ones are concerned, added education may not always be enough to turn the tide. A mayor of a rural municipality (Mr. Martin Leren, Dovre) made a statement some time ago which is still fairly typical, and which illustrates this fact:

> "Education in the remote districts may be advantageous to the individual, but not necessarily to the development of the region. Those who get an education leave the area. Therefore new jobs have to be created before the districts can benefit from education."

The point of view referred to here has been underlined in several proposals submitted to the Storting (the Norwegian Parliament) by the Government during the last three or four years. White Paper No. 13 (1972/73): "Ways and Means in the Development of the Regions", introduces the terms "regional centres" and "local centres". The latter category includes small and middle-sized centres whose primary function is to serve people within daily commuter distance. These centres should at least meet the local requirement for social services, health services outside hospitals, nine years' compulsory school for everybody, adult education, facilities for spare-time activities, everyday commodities, the more important speciality goods, personal services, and postal and banking facilities. The former type of centres should cover a wider spectrum of specialised goods and services and have middle-sized and even bigger enterprises, hospitals, vocational schools and other secondary schools, etc.

Some centres of both types have acquired a status of primary centres for industrial growth, originally inspired by the British system of Industrial Estates. As of February 1976, 13 industrial plants had been established. When finished, such centres in Norway will each have from 250 to 1,500 employees. It is stressed that the

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1) Martinussen: Fjerndemokratiet (The distant democracy), Oslo 1973.

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development must take place at a pace which is in harmony with the overall development of the community where the plant is located. It is thus required that service sectors like education, housing, etc., are developed simultaneously. A basic principle is that jobs and functions should be located at the most decentralised geographical level which allows for the running and further development of the activity in question.

As the development goes on, it is anticipated that the neighbouring communities will also benefit from the growth. There are indications that positive secondary effects can be traced in some instances.

Not everybody is in favour of growth-centre policies. In a recent article on District Development and Centre Hierarchy, Mr. Noralf Veggelund, Dean of Oppland Regional College, states that it is taken too much for granted that only communities which have already shown that they are viable shall continue to live. In his view, the viability proven is, in too many instances, a result of public activities already under way; activities which would have had a similar growth impact on almost any community. In his home county, Oppland (Østlandet), for example, 15 communities - the ones with more than 1,000 inhabitants - would probably enjoy public development support, while about 50 communities could be "sacrificed".

Most Norwegians would probably agree that one should not look upon society merely as a system of industries, trades and enterprises. It is widely accepted that one should make great efforts to make the living conditions equally attractive in small and large communities. This is a challenge to all decision-makers. The general impression is that at the present time a majority more and more tend to respond favourably to it. The perspective is a more even distribution of the population than could be foreseen only a few years ago. With increasing resources there are now realistic hopes for dynamic development in many remote areas, even if they have not been formally adopted as growth centres.

It is not easy for any society to find the measures to accommodate all individual wishes for a meaningful job in a preferred locality. Both inside and outside the educational sector the policy is to spread the activities as far as economically possible, and with due regard to the desirability of a reasonable milieu for the activity in question. Professor Øyvind Bjørke at the Norwegian University College of Advanced Technology, Trondheim, may have found one possible measure in what may be called "the spreadable industrial enterprises", or "a system of integrated production". The idea is to construct production units which, by means of data technology and a high level of automation, will be able to do a varied selection of jobs within the framework of the machine shop industry. Fairly autonomous production units, in different locations, will be responsible for a certain share of the production, at modest additional costs. The separate units will nevertheless be part of the total enterprise, and they will each represent from 5 to 15 jobs.

As will be seen later the Regional Colleges might to some extent be called an educational parallel to the spreadable industrial enterprise.

There is of course the possibility that the introduction of quite sophisticated production processes into small localities might increase the feeling of powerlessness on the part of the local jobtakers. This could happen especially since only part of the production takes place there. They may also feel that the enterprise stands for values other than those they are familiar with in their local environment. Thus there can be a combined effect of increased complexity and change of values which makes it even more difficult for the local people to affect, or reach the level of decision-making.

Professor Hernes' model for the distribution of power in a society includes the possibilities of an exchange of control of different actions or events, and of learning through experience. The power concept is related to the value of control over an occurrence in such a way that important matters carry major weight The coupling of control over several central issues, resources, or decisions is the primary source of power, and the key to decision-making. Such control is difficult to exert outside the main power centres, and to function in this capacity requires education and practical experience.

IV. REFORMS IN REGIONAL AND LOCAL GOVERNMENT

The third of the commissions whose work may throw light upon the new development in the Norwegian scene is the committee appointed to propose a redistribution of authority and responsibility between the central and the regional systems of government (The Juel Commission)(1). This task seems particularly appropriate as a response to the following more general statement of the OECD Examiners:

> "....we would suggest that the Norwegian authorities might consider strengthening administrative bodies at an intermediate level."(2)

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1) NOU 1974:53 and NOU 1976:17.

2) *Reviews of National Policies for Education; Norway*, *op.cit.*, p.42.

The main three targets for the Juel Commission are to suggest steps that can lead to increased decentralisation, further democratisation, and to efficient administration. The first two targets may need brief comment here.

According to a preliminary report from the Commission,(1) to decentralise is to transfer more issues to regional or local authorities and/or give such bodies extended powers to make decisions. It is not difficult to find examples of an actual transfer of responsibility, as suggested by the Commission, even before it has delivered its final report. Instances from the educational sector are the transfer of all secondary education from central to county authorities, and the greater powers given to the county authorities in their administration of schools already under their auspices.

There is a general feeling in Norway that the negative aspects of a centralised system could be numerous. One such aspect is the time factor: as the central authorities normally have to rely on bodies in the regions to collect relevant information and prepare the ultimate decisions for the central bodies, there may be a lot of regionalised work involved anyway. This procedure often entails duplication of work, and consequently a loss of time. More important, if the policy-making and decision-making rest with the centralised bodies, the local organs are restricted to an auxiliary role which does not stimulate their potential for innovation and initiative. They may also regard themselves rather more as representatives of the central body in question, than as conveyors of regional and local premises and priorities in their own right.

The concept of decentralisation is of course closely linked to the concept of democratisation. In a well-established democracy a policy of democratisation is a policy aimed at improving the democratic structures and procedures already in place. Such a policy involves some very concrete measures, for example:

- A strengthening of the autonomy and economy of the local communities.
- Increased influence of elected representative bodies on planning and development.
- Establishment of local committees at sub-municipal level to create a direct "grassroots" influence.
- Introduction of direct elections of such assemblies, and an upgrading of these assemblies to be major political decision-making bodies.

In addition to the strengthening of the formal political bodies at county and municipal levels, a continuous effort is recommended

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1) NOU 1974:53.

in order to establish or strengthen more informal contact networks between individuals and interest groups on the one hand and officials and politicians on the other.

The Juel Commission is, in particular, concerned about the two aims of decentralisation and democratisation. This fact does not imply of course that the Commission overlooks the demand for a dynamic and efficient administration. The recipe is to compromise without forsaking too much of any one principle. As a general rule the decisions should be made at the lowest possible level. It is admitted that this must sometimes entail a certain sacrifice of inter-regional or inter-county, perhaps even inter-municipal, equality. In the long run it is to be hoped that the ideas of decentralisation and democratisation get so well founded that the risk of a return to a more centralised system will gradually diminish, and that equality can also be achieved on a basis of decentralisation of decision-making.

V. DECISION-MAKING IN HIGHER EDUCATION

In the last section of this report attention will be paid to the ongoing effort to decentralise decision-making inside the sector of higher education. Adult education will be dealt with only to the extent that it takes place in connection with, or as an alternative to, higher education. (In most instances reference could very well have been made to a similar development in secondary and primary education.)(1)

At the present time there are approximately 60,000 students in Norwegian higher education; 42,000 (70 per cent) are at the universities and 18,000 (30 per cent) in regional colleges. The teacher to student ratios in both systems are roughly 1:11. Almost one out of two university students (20,300) study at the University of Oslo. The Universities of Bergen (8,600) and of Trondheim (8,300) have a big share of the other half. The University of Tromsø (in the North) had approximately 1,700 in 1977. Of the regional colleges the district colleges (or regional study centres) have 4,900, and the teacher training colleges 11,200. The technical colleges were taken over by the State from the counties in 1977, and this adds another 4,500 students to the regionalised system of higher education. The

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1) Readers who are primarily interested in basic or further education will find considerable information of the corresponding development there in the Examiners' report, Reviews of National Policies for Education: Norway, op.cit.

further development of regional study centres, from 9 in 1977 to 17 or 18, and the further extension of the northernmost university are tasks of the highest priority in the planning of higher education and research. Also of the highest priority is adult education based on the concept of lifelong learning (or recurrent education) inside and outside the institutions. (The regional study centres had 3,500 ordinary students and an additional 2,500 part-time students in 1975.) Outside the universities and regional colleges more informal, but State-supported organisations for adult education play a part in spreading elements of higher education - often to the more remote areas where there is no university or regional college. From now on all plans for such activities will have to be submitted for approval to the newly established Regional College Boards and for co-ordination with the institutional offer of adult education. These boards will become important fora for decision-making in matters of higher education and research, and they will operate on that intermediate level which the OECD examiners so strongly recommended should be strengthened. The introduction of the regional college boards and the mandate given to them, may here serve as an illustration of a more general effort towards decentralisation of decision-making from the centre to the regions and to the institutions located there.

The regional higher-education boards

These boards are normally composed of nine members of whom five are elected to represent the region (with two exceptions a region is a county in this context), and four (two teachers and two students) represent the institutions. At first there was considerable debate about the feasibility of having the majority of representatives from outside the institutions. Critics who looked to the universities for a model, stressed the traditional autonomy of institutions of higher education, and recommended that a similar model should be adopted in the regions. Some of the teachers in regional colleges and large groups of students supported this point of view; at some institutions a majority of the students boycotted the boards. Some of the teachers and administrative staff at the district colleges, accustomed to having a board of their own, felt that it was no advantage to share a board with a technical college and a teacher training college, and perhaps even with other institutions. It would take more resources than could be spared, they felt, to "upgrade" such institutions to an "academic" standard, and in the meantime the regional study centres could suffer. Also the community-oriented and vocationally- and interdisciplinary-oriented philosophy, and even the resources for research and development, could be at stake, it was felt. On their side quite a number of teacher training college staff feared that the profile their institutions had acquired could be disturbed. Their

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role was to train teachers, primarily for the primary school, in a teaching environment which should not divert its attention to a number of alternative objectives.

To take instructions direct from the Ministry of Education, it was admitted, gave no great amount of autonomy. On the other hand, to come under the regional board could mean extra bureaucracy and an end to the direct contact between the institution and the central authority.

It cannot be denied that to have a direct contact with the Ministry of Education has, not least in university quarters, been looked upon as a privilege. For the time being there is no doubt a certain pressure upon the universities from external sources to accept a certain influence of extramural interests. The motivation for this is partly that the expertise and resources of the institutions should benefit society at large in a more direct way. There is so much planning to do and so many problems to solve that require the contribution such milieus can provide. A more client-oriented attitude on the part of the institutions could have as a natural consequence that "the clients" be represented in the decision-making, or at least on an advisory board for the whole sector of higher education. Any of these models would have to give some guarantee as to the internal professional autonomy of the institutions in question. As far as the universities are concerned the direct contact with the Ministry would also be retained, particularly in administrative matters.

There may be an overall trend for institutions with very little autonomy so far (teacher training colleges and technical colleges) and those with great autonomy (universities) to come closer to the model of the regional study centres. The recipe could be to develop or preserve a high degree of professional autonomy and to secure an optimal amount of extramural participation in the process of decision-making.

The mandate of the Regional Boards

It is the responsibility of the Regional Boards:

a) To promote contact and co-operation with potential students, the education system at large, authorities, working life, organisations, and institutions inside and outside the region;

b) To examine the demand for higher education in the region and to assign priorities to the various fields of studies. The Board is required to give advice to the competent decision-making bodies in matters of localisation, objectives, principles, framework and structure of the educational provision of the region;

c) To prepare annual budget proposals and long-term budget proposals for all activities for which the Board is responsible on the basis of budgetary input-priorities from each institution;

d) To adminster and allocate resources which are placed at the disposal of the Board in accordance with the preconditions of Parliament;

e) To decide on the approximate number of new study places on the basis of proposals from the individual institution and the stipulated budget;

f) To play a co-ordinating part in adult education;

g) To provide the necessary facilities for the study activities;

h) To co-ordinate study offers, research, the use of facilities and other resources under the responsibility of the board and to acquire an overview of, and to take initiatives in, the fields of planning and development in these and other relevant areas;

i) To evaluate and sanction the internal governing arrangements and bodies proposed by the individual institutions;

j) To contribute to the solution of the social and welfare problems of students and staff;

k) To engage staff (with a few exceptions in cases where the Ministry has the authority to do this).

The institution concerned should be heard before a decision is made. Part-time faculty and staff can be engaged by the institution for a period of up to one year. It should be noted that subject to the approval of the Ministry a Regional Board of Higher Education may delegate authority which is otherwise given to the Board.

It is still too early to form an opinion about how successfully the regional boards will be able to perform their challenging tasks. Two criteria for success are very important and may sometimes be in conflict with each other. One is the fulfilment of the promise to the regions that the regional system of higher education shall be a resource for the region. In this context the research and planning and development expertise in the institutions must play a vitalising, or revitalising role. The requirements of the region and its various districts should be of great concern to the institution. At the same time it should be stressed that a school of higher education is something more than a new step in a process of regional development. It has an integrity of its own, and its own particular challenges as a link in a chain of institutions which share the responsibility of higher education and research in a national context also.

It is important that the new Board members see the double dimension and see to it that more than one perspective influences the present effort. The institutional representatives on the Board seem, in some cases, to fear that the majority could sacrifice the national responsibilities and quality aspects to other claims. The external representatives, for their part, may have a feeling, legitimate or not, that the internally elected Board members may give excessive priority to "academic" subjects and neglect the vocational and interdisciplinary aspects and adult education.

For the moment approximately 30 per cent of the students in the regional study centres take courses which have direct parallels at the universities. The large majority of 70 per cent mainly attend interdisciplinary studies of two or three years' duration. They are awarded the degree of "Høgskolekandidat" which has no parallel at the universities. The problem of how much credit university studies of short duration (1 or 1 1/2 years) should carry for the two or three years' regional college studies, and vice versa, has for the present only been partially solved. The ultimate solution might be that all degree courses will be recognised by the total system of higher education on a multilateral basis.

The various dimensions of the tasks allotted to the regional college system make it extremely important that the board members know their region and have a thorough understanding of the functions of higher education in society. At best they can contribute very markedly to a cultural as well as, in a wide sense, to the full-fledged economic development of the region in question. The activities and skills developed through new resources should also have a dynamic impact on the further development of self-confidence and initiative at regional and local levels. The local problem-solving process may require an input which is different from the one found elsewhere. It may even be a matter of counter-expertise in the sense that the solutions arrived at locally may come into conflict with solutions developed centrally.

The candidates and the labour market

One very important input factor for the decision-making process is the reaction of the labour market to the output of candidates. The OECD Examiners stressed this point in a rather dramatic way:

> "A critical issue...is the successful placement of graduates from Regional Colleges in positions which they view as commensurate with their training. This has proved a major stumbling block to attempts to develop alternative short-cycle institutions of higher education in other countries. We feel that not enough attention has thus far been given to this particular problem..."(1)

The current labour market statistics reveal that there is moderate unemployment of university and regional college graduates. This

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1) Review of National Policies for Education: Norway, op.cit., p.57.

unemployment, however, is "balanced" in the sense that both categories are vulnerable to approximately the same extent and that they do not always obtain jobs commensurate with their training. In some instances this is due to the fact that the jobs are not always available where the candidates prefer to live, or that jobs are not forthcoming in sufficient quantity in regions or districts where the candidates are educated. While university candidates tend to be confronted by the former dilemma, for regional college candidates it is often the latter. It is of course important that the decision-makers on the regional college boards are sufficiently concerned about the harmonious development in the output of candidates and jobs in their respective, and quite different, regions.

The experience so far is that candidates who are educated in a particular district or region are much more apt to stay there than candidates who have gone elsewhere for training and education. The regional board members are no doubt aware of this phenomenon in their forward planning. A means to counteract regional imbalance could be to unite the concept of "the spreadable industrial enterprise" with a concept of "a spreadable educational organisation". In both instances it is fundamental that a development towards a spread of resources and institutions does not go further than is compatible with acceptable quality standards. The idea is not to offer the districts' enterprises and study centres which are inferior to their counterparts in the central areas. Such a policy would only cement the present regional and intra-regional imbalance.

The role of the institution in adult education

Conclusions drawn by the OECD Examiners are once more very appropriate and can serve as input in the regionalised planning and decision-making process:

> "A policy of lifelong learning cannot simply be grafted onto an existing system of education; it requires fundamental changes in the role of all institutions of education."
> "Crucial to the whole development of lifelong learning is the question of its degree of integration into the formal system of education, including upper secondary schools, universities and Regional Colleges."(1)
> "In particular we doubt whether any policy which relies on the 'mainstream' institutions of education is likely to succeed in shifting the burden of education from 'front loading' to lifelong learning. There exists a conflict between the requirements of front-loading, lock-step education and those of recurrent, lifelong learning which is every bit as fundamental as the traditional conflict between academic and vocational education.

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1) Reviews of National Policies for Education: Norway, op.cit., p.54.

To assign 'regular' institutions the central role in adult education is a way of disregarding this fact."(1)

It is no doubt true that it is difficult for any institution to undertake substantial shifts of emphasis in its profile. However, this is especially the case for institutions which are old enough to have a tradition. Norway is in the almost unique position that two out of four universities and all the regional study centres are of a very recent origin. The teacher training colleges and the technical colleges are also just now undergoing fundamental changes in order to adapt to the new regionalised organisation. During a period of general transition it will probably be easier to face the additional challenge represented by the further introduction of a policy of lifelong learning. It should also be taken into consideration that general political objectives like "filling the educational gaps between the generations", "helping women catch up", "removing formal educational barriers", etc., also have an impact on the internal philosophy of the institutions. In a rather egalitarian society it is difficult to be very exclusive. Besides, all institutions of higher education have a quite extensive experience with adult students. The general impression is that they make the learning process more realistic by making references to practical work experience and to social life outside the institution. The State allows part-time students their share of government loans and, in some cases stipends, as a matter of course, provided that they carry half the regular study load or more. Young full-time students are also apt to get some work experience along with, or in between, their studies, when the opportunity occurs. Any amount of practical experience could prove valuable when the time comes to find a more permanent footing in the labour market. It is believed that the external members of the regional boards will support an "open-door" policy and thus make it easier to integrate lifelong learning into the regional institutions. In the university sector attention is now gradually being focused on the opportunities inherent in recurrent education. Both systems are aware that this is a sector of higher education which will have the highest political priority in the years to come. The regional study centres have always had permission to spend up to 25 per cent of their resources on adult education. There is no reason why such a priority should not be followed up by the other institutions of higher education, also via the internal decision-making apparatus.

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1) Reviews of National Policies for Education: Norway, op.cit., p.56.

The internal decision-making apparatus

The institutional counterpart to the regional boards of higher education is the internal decision-making bodies. The regional study centres had very extensive freedom to experiment with such bodies during their trial period from 1969 to 1974, and several models are now being submitted to the regional boards for approval. The technical colleges and the teacher training colleges are also doing extensive planning and development work collectively and individually in order to build up internal decision-making structures based on the principle of a balanced participation of faculty, administrative staff, and students. The basic principle is that no single group of representatives should be able to dominate the two other groups. The most "radical" experiment as to the degree of student representation has been internal institutional decision-making bodies with 50 per cent students, and the other 50 per cent shared between faculty (2/3) and technical and administrative staff (1/3). The technical colleges are now discussing a 40:40:20 model, and the teacher training colleges models ranging from 5:5:1 to 8:8:2. The universities seem to be inclined to keep the student representation within margins of 20 to 30 per cent. The institutions in all sectors will probably manage to produce models which achieve unanimous, or at least a high degree of internal consensus, and it is unlikely that the regional boards will go far in the direction of demanding uniformity.

Not less important than the composition of the institutional decision-making bodies are their mandates. The main principle is that the curricula and everyday decisions about the organisation of the various studies should be taken by faculty, students and staff members on a democratic basis in the appropriate elected body. Such bodies also prepare budget proposals and long-term and intermediate-term planning data and premises for further discussion by the regional boards.

The idea is that every decision should be made as near the "grassroots" level as possible for the decision in question. In a few years from now implementation of decisions will probably be subject to institutional, regional, and national evaluation. For the moment the idea of decentralisation of decision-making has been grasped and implemented with great enthusiasm. It has so far certainly not been necessary to give it new impetus to regain its vitality. In the long run a prophesy to this effect made by the OECD Examiners may still come true, for example, if the decision-making process should become so time-consuming that the positive effects of increased participation are no longer obvious to the participants. It may well be that a real risk of such a development does exist. The hope is that the new models and participating milieus will prove flexible enough for rapid change, if necessary. If not, the effort could still be compromised and labelled premature, as indicated by the Examiners.

Résumé du rapport technique n° 10

DECENTRALISATION REGIONALE ET LOCALE DES POUVOIRS DE DECISION DANS LA POLITIQUE D'EDUCATION EN NORVEGE

par
T. Hanish

Cette étude analyse la participation aux prises de décision dans la politique norvégienne d'éducation. Depuis l'examen de cette dernière, publié par l'OCDE en 1976,(1) trois commissions se sont occupées du problème de la décentralisation des pouvoirs de décision.

a) La Commission Rødseth, qui a déposé son rapport en mai 1976, examine la relation entre l'égalité en matière d'éducation, les ressources politiques et le déséquilibre régional. Le rapport affirme qu'un surcroît d'éducation augmente normalement les ressources politiques des individus et des groupes, c'est-à-dire les ressources propres à consolider ou à modifier les conditions existantes. Les individus qui ont reçu une éducation plus longue que la moyenne sont représentés dans une mesure bien plus que proportionnelle à leur nombre dans tous les domaines de prises de décision. Cependant, en Norvège, les différences dans la quantité d'éducation reçue tendent à s'accroître, en fonction de l'âge, en faveur des groupes urbains, des groupes à statut et à revenu élevés et en faveur de ceux qui ont déjà atteint un haut niveau d'éducation. Afin de surmonter les inégalités créées par les structures sociales traditionnelles et de combattre l'influence importante qu'a le système éducatif traditionnel sur la perpétuation de ces inégalités, il est nécessaire d'organiser à divers égards non seulement une politique de discrimination non formelle, mais aussi une politique de discrimination positive en faveur de ceux qui sont désavantagés par leurs origines familiales, le milieu social, ou la situation géographique.

b) La Commission Hernes, dont le rapport n'est pas encore publié, examine la structure actuelle du pouvoir en Norvège, question particulièrement importante pour les régions. D'après une

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1) Examens des politiques nationales d'éducation : Norvège. OCDE, Paris, 1976.

enquête récente (Martinussen, Oslo 1973) la capacité d'influence des individus dépend des facteurs suivants : appartenance à une organisation, indépendance professionnelle, niveau d'éducation, ressources financières, possibilités personnelles de communication. Indirectement, l'éducation affecte tous les autres éléments. En conséquence, la création de nouvelles possibilités d'enseignement dans une périphérie géographique peut être un moyen efficace d'y transférer des ressources politiques. Mais l'éducation n'est pas en soi la seule solution en raison de la tendance qu'ont les gens instruits à quitter leur région. La création d'emplois nouveaux doit donc être antérieure aux implantations d'établissements d'enseignement. Malgré une certaine opposition, le gouvernement norvégien a donc entrepris une politique de pôles de croissance, qui se traduit par la promotion de villes petites et moyennes destinées à fournir des services sociaux, éducatifs, commerciaux et de loisirs à la population de leur environnement proche. Ces villes seront aussi des centres principaux de croissance industrielle employant chacun de 250 à 1500 personnes.

c) La Commission Juel a été créée pour proposer une nouvelle répartition du pouvoir et des responsabilités entre les systèmes central et régional de gouvernment. Dans le secteur de l'enseignement, on peut donner comme exemple le transfert de toute l'éducation secondaire du pouvoir central au pouvoir régional et l'accroissement de la responsabilité de celui-ci dans la gestion des établissements qui sont déjà sous sa tutelle. On espère que, à long terme, les deux objectifs de décentralisation et de démocratisation seront pleinement acceptés et rendus possibles par l'efficacité de l'administration.

POUVOIR DE DECISION DANS L'ENSEIGNEMENT SUPERIEUR

Il y a actuellement quelque 60,000 étudiants dans l'enseignement supérieur en Norvège, dont 42 000 (70%) à l'université et 18 000 (30 %) dans les collèges régionaux. En plus des universités et des collèges régionaux, des institutions d'éducation des adultes, moins formelles mais subventionnées par l'Etat, jouent un rôle dans l'enseignement supérieur, souvent dans les régions éloignées où n'existent pas les deux premiers types d'établissements. Des Conseils de collèges régionaux, récemment créés, ont reçu la responsabilité de la politique de l'enseignement supérieur dans les régions en matière de financement, de coordination, de programmes, de recherche. Ces conseils se composent généralement de neuf membres : cinq élus pour représenter la région et quatre (deux enseignants et deux étudiants) pour représenter les établissements. Cette structure reflète l'intention de voir l'enseignement supérieur jouer un rôle important dans le développement culturel, social et économique des régions, tout en préservant leur intégrité propre. Actuellement, environ 30 % des étudiants des centres d'études régionaux suivent des cours similaires à ceux des universités, mais la grande majorité suit des études interdisciplinaires de deux ou trois années aboutissant au niveau de "candidat de l'enseignement supérieur" (høgskoleskandidat). Lorsque le nombre des emplois disponibles ne sera pas suffisant par rapport au nombre des étudiants dans une région donnée, le Conseil des collèges régionaux s'efforcera de favoriser l'équilibre entre les flux de candidats et la création d'emplois.

EDUCATION DES ADULTES ET TOUT AU LONG DE LA VIE

Le rapport de l'OCDE a souligné l'importance de l'éducation tout au long de la vie, mais en notant qu'il existe un conflit entre les besoins d'une éducation de type traditionnel et ceux d'une éducation récurrente tout au long de la vie, conflit aussi important que celui qui existe entre l'enseignement académique et professionnel. Donner le rôle principal dans l'éducation des adultes à des établissements "classiques" équivaut à ignorer cette réalité. En Norvège, cependant, nombre d'établissements d'éducation sont d'origine récente et ne sont pas freinés dans leur mission par des méthodes traditionnelles. En outre, les Centres d'études régionaux sont autorisés à consacrer jusqu'au quart de leurs ressources à l'éducation des adultes.

Au sein des établissements eux-mêmes, la participation aux décisions a fait de grands progrès. Des organes internes de prise de décisions ont été instaurés sur le principe d'une représentation équilibrée du corps professoral, du personnel administratif et des étudiants. Les mandats de ces organes ont une large portée. Ils reposent fondamentalement sur le principe que les programmes d'études et les décisions au jour le jour au sujet de l'organisation des études doivent être fixés par les professeurs, les étudiants et le personnel administratif dans un organe démocratiquement élu. En dépit de certaines difficultés, l'idée d'une décentralisation des pouvoirs de décision a été acceptée et mise en oeuvre avec enthousiasme dans les établissements norvégiens d'enseignement supérieur.

Technical Report No. 11

THE ROLE OF SELF-GOVERNMENT IN EDUCATIONAL POLICY AT REGIONAL LEVEL IN YUGOSLAVIA

by

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SUMMARY

Yugoslavia, a country with about 22 million inhabitants has a federal structure. The decentralisation previously brought about and the 1974 Constitution have further stimulated the processes not only of the fuller transfer of jurisdiction in the field of education to the Socialist Republics (six) and Socialist Autonomous Provinces (two), but also of the stronger development of the self-governing system at various levels. Today, schools and other educational institutions and all those employed in them play a greater part in management, including the election of the Council and other organs of self-government, forming the Statutes, the work programme, the financial plan, employment and dismissal of teachers, etc. At the same time, working people employed in economic and social activities and citizens in local communities who provide the money, occupy a constitutionally-determined position in shaping educational policy. People employed in schools as well as people working in companies, institutions or local communities form themselves, either directly or through elected delegates, into self-governing communities of educational interest at commune, region or republic level, or by economic or social activity. At meetings of these communities, in addition to the agreements reached, a free exchange of labour and finance takes place, i.e. the educational policy is decided on for a given level, along with economic needs, work programmes, the school system and its capacity, the planning of development, the cost of education, the financing of certain activities and the assessment of labour, etc.

In such a situation, particularly since the 508 communes have strengthened as important, basic socio-political communities which include delegations from self-governing communities of interest in their assemblies, and since they greatly affect equality of the policies of the republics, i.e. provinces, a widespread need for special regional education does not appear everywhere, especially not as a function of decentralisation.

There are further initiatives from "below" to solve certain problems over a wider area or by groups of those interested, but this should not have too wide or distant a scope. The 1974 Constitution has laid down, among other things, that on the basis of the expressed needs of the communes, but only for needs actually agreed upon -

intercommunal regional communities may be formed, with assemblies in which decisions can be made according to decisions of delegations from the communes, and together with departments with which there exists a common interest.

Some self-governing communities of interest in education are also organised regionally, though not everywhere. At this level they decide on matters relating to the regional development of education, over which they have been given jurisdiction by delegates from the basic communities and schools.

Regional intercommunal institutions exist for the promotion of education, and perform consultancy and teaching theory educational supervision over the running of schools. Both communities and institutions strive towards a wider integration of interests. Schools also associate into school communities at various levels.

The many universities (18), 2-year and 4-year schools of higher education (290) whose centres are outside the big university centres, contribute a potential kind of regionalisation by their very existence and operation.

A socially broadly-based reform of education, especially at the level of secondary education, will depend largely on its effect on the regional organisation of society and its educational activities.

Experience of the more recent regional organisation has still not been studied closely. Some of the facts available show positive results in fields such as the strengthening of democracy, extending accessibility to secondary education, equalising conditions, better matching of school and the economy, bringing about changes in the school curriculum, rationalisation of the school network, etc.

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I. AN EXPLANATION OF SOME SPECIFIC ASPECTS AND BASIC TERMS OF THE SOCIO-POLITICAL SYSTEM IN YUGOSLAVIA

Socio-political Communities in the Federation: Republics, Provinces, Communes

Yugoslavia (about 22 million inhabitants) is a federal socialist State consisting of six republics: Bosnia and Herzegovina, Croatia, Macedonia, Slovenia, Montenegro and Serbia. There are two autonomous provinces which are constituent parts of the Socialist Republic of Serbia: Kosovo and Vojvodina.

Yugoslavia is defined in the Constitution (1974) as a federal State, a community of voluntarily-united nations and their republics and provinces.

A republic is not a region. It is, according to the Constitution, "a state based on the sovereignty of the people and the power of and self-government by the working class and all working people, and is a socialist, self-governing democratic community of working people and citizens and of nations and nationalities having equal rights".(1) The province also loses its regional character. It has, within the framework of the Republic, its own Constitution and legislature.

Working people and nations and nationalities exercise their sovereign rights in socialist republics as well as (within the framework of the Constitutional rights) in provinces, and in the SFR of Yugoslavia, when this is determined by the Constitution and is in the common interest.

In the Federation, the workers, nations and nationalities ensure:

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1) According to data from the 1971 census, the citizens of Yugoslavia declared themselves to be: Montenegrians, Croats, Macedonians, Moslems (in the sense of a nationality), Slovenians and Serbs, Albanians, Bulgarians, Czechs, Italians, Hungarians, Rumanians, Russians, Slovaks, Turks, etc. A number of people did not declare their nationality, but described themselves as "Yugoslavs" or put down their traditional region of origin (e.g. Bosnian, Dalmatian).

A multinational structure demands that, in accordance with the Constitutional rights, education be provided in the languages of the nations (Serbocroat, i.e. Serbian or Croatian, Slovenian, Macedonian) and for members of other nationalities, in their own languages. Because of this, there are primary and secondary schools teaching in Italian, Albanian, Bulgarian, Czech, Hungarian, Rumanian, Russian, Slovak, and Turkish, as well as the language of Gypsies, etc. In some places, schools are bilingual.

- socialist social relations, based on self-government by workers and the protection of the socialist self-governing system;
- national freedom and independence;
- brotherhood and unity of nations and nationalities;
- uniform interests of the working class and solidarity among workers and all working people;
- scope and freedom for the all-round development of the human personality and for the bringing together of people and nations and nationalities in conformity with their interests and aspirations on the road towards the creation of an increasingly rich culture and civilisation within a socialist society;
- the unification and adjustment of efforts to develop the economic foundations of a socialist society and the prosperity of the people;
- a system of socio-economic relations and a uniform foundation for a political system which will ensure the common interests of the working class and all working people and the equality of the nations and nationalities;
- the linking of their own aspirations with the progressive development of mankind(1) (from the basic principles of the Constitution).

As can be seen, education and certain other activities do not come within the immediate competence of the Federation - which does not mean that it does not have any effect on them. Education is regulated directly at the level of republics and provinces, but also within the framework of other socio-political communities,(2) local communities(3) and within the so-called self-governing method of organising according to field of interest. It is also brought about in other educational organisations whose self-governing scope is very wide.

The Function of Self-Governing Communities of Interest

The Constitution of the SFRY (Socialist Federation of Republics of Yugoslavia) specifically ensures that working people shall satisfy

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1) Questions concerning this matter are decided upon in the Federation "according to the principles of agreement among the republics and autonomous provinces, solidarity and reciprocity, equal participation by the republics and autonomous provinces in federal agencies, in line with the present Constitution, and according to the principle of responsibility of the republics and autonomous provinces for their own development and for the development of the socialist community as a whole".

2) These are, according to the Constitution, communes. Such functions may also be taken over by intercommunal regional communities.

3) Villages and smaller inhabited areas within a commune are organised into local communities as citizens' territorial communities of interest.

their personal and joint needs and interests in the field of education, science, culture, health and other social activities, which are part of the unified process of social labour, by freely exchanging and pooling their labour and the labour of workers in organisations of associated labour(1) operating in the fields mentioned. The exchange of labour in particular takes place at assemblies of "self-governing communities of interest in education" (2) which consist on the one hand, of delegates working in the schools, and on the other of delegates employed in other fields of activity.

In the greater proportion of republics and autonomous provinces the self-governing community of interest in elementary education exists at the level of the commune. It consists of basic communities and units - located in local communities or the school. Delegates of working people (citizens) and of local communities participate in the activities of these communities. At the level of the Republic these are either republican communities or a union of self-governing communities of interest in elementary education. For the other part of education, so-called vocationally-directed education (i.e. the whole of secondary general and vocational education, as well as the 2-year and 4-year higher education), self-governing communities of interest in a certain number of activities are formed (e.g. for metal, electrical or civil engineering, agriculture, health, management-administrative, teacher-training, scientific and other fields of activities) either at a particular educational centre, or on a regional basis (and then the region need not correspond to a regional political community) or at the level of the republic, or else combined.(3)

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1) These are firms and institutions organised on a self-governing basis. The basic form is the so-called basic organisation of associated labour (BOAL) which is a legal entity, which independently lays down its statutes and other self-governing acts, decides on the acquisition and distribution of income, workers' acceptance to work, the election of self-governing bodies and directors, etc. The BOAL can exist as an independent work organisation or it can become associated with another BOAL into a joint work organisation (larger enterprise or institution) or into an even wider form: a composite organisation of associated labour. Enterprises or institutions can - according to their business or other interest - form their business associations or have common services for a wider area (commune, region, republic). Each organisation of associated labour elects its own delegation, members of which are elected into the communal assemblies and assemblies of self-governing communities of interest.

2) Self-governing communities of interest also exist for other social activities: science, culture, health, social protection, child-welfare protection, etc. They may also be formed, if the corresponding work organisations agree to it, in the economy.

3) The units are usually formed within educational centres (i.e. schools) and the basic communities within the commune. Then, at the level of the Republic, it is possible to form a union of communities of the same profession, or a union or federation of all communities of vocationally-directed education. There are suggestions of creating certain forms of organisation according to interest in the field of elementary and vocationally-directed education at the level of the Federation.

The organisation of self-governing communities of interest in education, whilst strengthening self-government in all schools,(1) is significant for creating a policy of transferring the function of the State (not only in the Federation or Republic, but also in the communes) to forms of more immediate decision-making by workers, i.e. in the function of decentralisation, removal of State control and the strengthening of a self-governing socialist democracy.

In the assemblies of self-governing educational communities of interest, the elected delegates, by secret ballot and on the basis of the statutes and self-governing agreements, jointly determine and ensure: educational policy in a certain field, economic needs, the necessary curriculum-management of education, the network and capacity of schools, norms for facilities and teaching staff, the cost of education, financial means, means for ensuring solidarity with other communities which have not sufficient financial means at their disposal, the criteria and forms of assessment on the basis of the volume, quality and quantity of labour, etc.

Self-government in schools starts, therefore, from the basic nuclei - the schools, faculties and other work organisations which are organised on a self-governing basis. The schools form their statutes and other self-governing acts on the basis of a joint programme (regulated by the republic, self-governing communities of interest, local communities, etc.), determine their annual educational programme and other forms of educational activities and development plans for one or more years. They elect their self-governing bodies,(2) plan and agree on the financial means for labour (on the principle of a free exchange of labour), independently determine the financial plan and distribute income, employ teachers and other staff

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1) Workers' councils started being formed in the fifties. The development of self-government in education was greatly affected later by the Law on Management in Schools (1955), the General Law on Education (1958), the Resolution of the Federal Assembly on the Development of Education on a Self-Governing Basis (1970); the Resolution of the League of Communists of Yugoslavia on Education (1974).

2) In schools, the school council is elected by secret ballot, and it can have its executive board, commissions and other bodies. In smaller schools (under 30 employed), the functions of this body are performed by workers' meetings. Workers' meetings and referenda are otherwise organised in all work organisations in order to organise and retain and ensure the participation of all working people in decision-making. Pupils and students, through their delegates, participate on an equal basis in the work and decision-making of the council and other bodies. They also have their own organisations, so-called "pupils' communities" and students' councils for yearly periods.

In schools, supervisory bodies are also elected (workers' control) and the delegates are elected to assemblies of: the commune, self-governing communities of interest, etc.

to work and also dismiss them, nominate the director for a four-year period (sometimes with the agreement of the founders). They determine the personal income (salary) of the teaching staff, the director and other staff on the basis of the results of their work.

When deciding on certain questions in the school council (e.g. adopting the statutes, discussing the financial situation, the results of work, the nomination of the director, etc.), delegates of the social communities also participate in decision-making, because education is an activity of special social significance.(1) In elementary education they are elected, in accordance with the agreements between the school and commune (i.e. the executive council of the republic if it is a question of, for instance, 2-year or 4-year higher education) by: the communal assembly (and local communities - for elementary education), work organisations, self-governing communities of interest, social and socio-political organisations, etc.

This attitude towards the problem of regional education has been expounded since it alone can give an explanation as to where some characteristics of regional organisation under the conditions of the dynamic socio-political and socio-economic development of Yugoslavia and its republics and provinces can be found.

Regional Organisation

In most republics and provinces, except in some fields (i.e. judiciary, internal affairs, traffic, etc.) there is no strictly defined level which could be called strictly regional. Even in the fields mentioned the term regional is not a unified concept as the territory encompassed by regional organisations of one kind does not necessarily have to be the same as another.

With the existing distribution of matters and jurisdiction between the Federation and republics, provinces and communes on the

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1) Within the 508 communes in the SFRY in 1975 there were 11,634 local communities. They exist in a large number of villages in rural areas, and in urban areas they encompass special settlements, blocks of houses or streets. About 10,000 communities have councils as elected governing bodies.

In accordance with the Constitution of the SFRY, the working people and citizens in a local community "decide on the realisation of their common interests and on the satisfaction, on the basis of solidarity, of their common needs in the fields of: physical improvement of their settlement, housing, communal activities, child care and social security, education, culture, physical culture, consumer protection, the conservation and improvement of human environment, national defence, social self-protection, and in other spheres of life and work". They co-operate with self-governing communities of interest within and outside the territory of the local community, with work organisations on their territory and through elected delegates "participate in the conduct of social affairs and in decision-making on questions of common interest in the commune and the broader socio-political communities". Units (sometimes basic communities) of self-governing communities of interest of elementary (and pre-school) education will be formed at the level of the local community.

one hand, and work organisations (enterprises, institutions and schools) as well as self-governing communities of interest on the other, it is obvious that the need for a stronger transmission of power from central to some "middle" level territorial bodies does not appear. Large cities are perhaps an exception, e.g. Belgrade and Zagreb, which already consist of several communes - not only within the narrow city limits but also in the suburbs and the other important powers some of them get from the republics and others from the communes.

In recent times, however, there has appeared a tendency on the part of work organisations, local communities, communes and certain self-governing communities of interest to discuss and decide on certain matters (especially those which they cannot easily solve alone), but only within the framework of agreements made on a self-governing basis on a higher, so-called inter-communal level. In Serbia (and some other republics and provinces), in accordance with the possibilities offered by the Constitution of the SFRY and the SR of Serbia, such regional organisation is already being put into practice. In Serbia (Serbia proper, without the autonomous provinces) there are nine regions, each of which (including the city of Belgrade) has as component parts several communes of an economic-geographic nature. The headquarters of the region are usually in one of the larger towns of that region (Smederevo, Zajecar, Nis, Leskovac, Kraljevo, Titovo Uzice, Valjevo, Kragujevac, Belgrade, etc.) but certain joint institutions can be located in other places.(1)

There is a trend to form such kinds of regions in other republics and provinces, especially when (as is the case in Bosnia and Herzegovina, Croatia or Macedonia) self-governing communities of interest and inter-communal educational institutions for territories wider than the commune already exist - and where sometimes there is also regional organisation in other activities. There is somewhat less interest in forming inter-organisational forms of management and self-government in republics and provinces with a smaller number of inhabitants (Montenegro, Slovenia, Vojvodina and Kosovo) although here too, some services, e.g. those for promoting education, appear mostly to be inter-communal or relate to a territory wider than a commune.

It could then be said that in the SFRY the problem of regional organisation in various fields is ever more present, but mostly as an expression of the needs of the communes, self-governing communities

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1) I.e. where the assembly of delegates of the communes and the leadership of socio-political organisations is located. Certain joint institutions such as: internal affairs, the regional institutions for promoting education, the specialist service of the regional employment community, the regional court, the regional chamber of commerce, etc., or they can be located in other places. In Serbia, the self-governing communities of interest in vocationally-directed education are formed according to regions.

of interest and work organisations to discuss and make decisions concerning the solution of problems of common interest on a wider basis, and a higher level (but still not too distant) and on a self-governing basis. Sometimes, from the standpoint of management, the need is felt for moving certain organs (supervision, statistics, etc.) to the level existing between republics (i.e. provinces), and the commune, for the more effective prosecution of affairs.

It should be borne in mind that the commune(1) in the socio-political system, especially its Assembly (which consists of three councils: the councils of local communities, councils of associated labour and the socio-political council) has wide jurisdiction(2) as the highest body of the basic socio-political communities (between working people, organisations of associated labour and local communities). Some of them cover a rather large, compact, unified and linked territory,(3) have a large number of villages,(4) a large number of inhabitants(5) and people who are working,(6) have a significant income(7) at their disposal, and link certain activities of the self-governing communities of interest. For this reason, some of the communes could be regarded as a kind of region. It is obvious, however, that the small communes could not have such a function.

It therefore remains natural that an area wider than a commune should primarily be considered a region, with strongly-marked common economic and cultural interests. This will be, for the present, considered to be a region, or other community of communes with certain of the jurisdictions of communes, i.e. republics, taken over on a self-governing basis.

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1) In the SFRY in 1976 there were 508 communes: 106 in Bosnia and Herzegovina, 20 in Montenegro, 112 in Croatia, 30 in Macedonia, 60 in Slovenia, 180 in Serbia (114 in Serbia proper, 22 in Kosovo and 44 in Vojvodina).

2) According to the Constitution of the SFRY (Article 116) the commune "is a self-governing community and the basic socio-political community based on the power of and self-government by the working class and all working people.

In the commune the working people and citizens shall create and ensure conditions for their life and work, direct social development, fulfill and adjust their interests, satisfy their common needs, exercise power, and manage other social affairs. The functions of power and management of other social affairs with the exception of "those which under the Constitution are exercised in the broader socio-political communities, shall be exercised in the commune".

3) About 9 per cent have a territory larger than 1,000 km^2, while about 5 per cent have an area smaller than 100 km^2.

4) e.g. 17 per cent have more than 100 villages. There are also small ones, up to 10 villages (about 6 per cent).

5) In 6.3 per cent communes there is an average of over 100,000 inhabitants. However, 5.3 per cent of the communes have up to 10,000 inhabitants.

6) 16.14 per cent communes have an average of over 15,000 employed in the social sector. There are small communes with up to 1,000 employed (5.7 per cent).

7) In 14.96 per cent communes, the average income is over 1,200 million dinars.

As has been said previously, there are also other phenomena, which especially reflect a partial and maybe more informal attitude towards integration at a higher level.

The process of regionalisation based on the principle of a community of communes is also linked with attempts at regionalisation, i.e. the joint solving of certain problems at a level higher than that of the work organisation, local community or community of interest, as well as the commune.

Certain laws, among other things, (e.g. the law on the self-governing organisation of several republics according to interest, the draft law on employment in Serbia, etc.) regulate or allow the possibility of forming appropriate communities of interest on a regional or intercommunal level, while not at the same time determining the territory of the region. The laws on educational services (Serbia, Croatia, Vojvodina, etc.) also point towards intercommunal (regional) organising, but also without determining the territories more closely.

A characteristic regionalisation (concerning questions of enrolment of students, and the number of kinds of higher 2-year and 4-year managers they prepare) which does not often coincide with the administrative-political or geographical one, opens a number of university centres, faculties and 2-year schools of higher education in places outside the republic or provincial centres.

There are similar phenomena in health (the existing and new hospitals and health institutions serve as points around which the various activities concentrate).

It may be said that there sometimes exists a latent resistance to the creation (especially territorial) of forms of social organisation at regional level with prerogatives of power. This, especially, because before the Second World War, the territorial, i.e. regional, division had the function of preventing the formation nationally of more compact communities, that is, national states.

There are positive traditions as well. During the Second World War, especially on liberated territories, apart from the provincial leadership (which enabled the creation of autonomous federal units and later republics), leadership of regions was also formed - regional, district and local peoples' liberation committees as organs of power elected by the people, as well as the leadership of political organisations. They acted clandestinely on occupied territories. The development of military operations and other reasons imposed the need for a change of the administrative-political divisions in some places. The division of levels (Federation, republic, province, region, district, commune) remained some time after the liberation. The territories of some ex-district peoples' committees are now covered by larger communes. Attempts appeared to ensure appropriate regionalisation for an area of several communes, almost spontaneously, especially where a larger town centre existed.

The present intercommunal (regional) communities, where they are formed, normally encompass a larger area than the district areas.

Links Between Socio-Political Communities and Self-Governing Communities of Interest

In the self-government system that has been described, the question of horizontal and vertical links in the forms of organisation and management which appear at different levels may be topical.

Among other things, the question of links between the system of organising working people in self-governing communities of interest at various levels and forms of self-management and power in assemblies, communes, regions, provinces, republics and the Federation is not insignificant.

Such a link, though at first hardly noticeable, does exist, and is further strengthened through the delegational system. The Constitution of the SFRY and of the republics and provinces provides for the delegations of assemblies of self-governing educational communities of interest within the territory of a socio-political community (the commune, community of communes, province, republic) to appear also as parts of the assembly of the socio-poltical community, in the "Council of Associated Labour". A joint session determines, on an equal basis, principles and decisions of common interest, such as that of co-ordinating the rate of contributions from which the means of financing are acquired, those concerning new capacities, etc.

On the other hand, the executive bodies of the assemblies of socio-political communities (communes, etc.), by inspection and through other management bodies have the right and duty to supervise the legality of normative acts and also their execution in the self-governing communities of interest.

Linking in the Federation

The question of how to solve problems at Federation level can certainly be raised. The lack of direct authority does not necessarily mean a total lack of activity. The Federation provides, among other things, and on the principle of solidarity, supplementary means for financing economically underdeveloped republics and provinces. Certain financial resources are used for social activities, including education.

The Constitution of the SFRY includes principles and regulations concerning: the ideological and scientific basis of education; its main aims; ensuring the "general social interest" in self-government; a free exchange of labour; the equal socio-economic position of those employed in education; ensuring conditions for the development and promotion of education as a whole, and on the basis of solidarity; the role of self-governing communities of interest and local communities; compulsory primary education lasting at least eight years; the right to education under equal conditions; the right to education in the mother tongue for members of the various nationalities; the right of religious communities to found schools for the education of their clergy, etc. The rights and duties are put into practice, however, mainly in the republics and provinces.

At the same time, there exists the possibility and practice of a constitutionally-provided-for exchange of experiences and joint, agreed-on, identical or similar ways of solving certain questions, but only with the agreement of the republics and provinces.

Co-operation first appears as a need from "below", i.e. as a need of the republics and provinces and schools. Socio-political organisations insist particularly on this. An important document on education adopted by the League of Communists of Yugoslavia (1974) points out the necessity of constant co-operation between the republics and provinces concerning all essential questions of the system and educational policy which are of common interest, and their development on a unified basis. The need for more intensive co-operation was pointed out, especially in co-ordinating legal and other normative processes, in working out educational curricula, in publishing textbooks, in the exchange of experience and information, and of co-ordinated international co-operation and entering into agreements concerning all other activities in this field which are important for the successful implementation of the policy of developing the education system in the SFRY.

Co-operation between republics takes place in particular through:

a) the Federal Committee for Science and Culture which consists mainly of delegates from republics and provinces, as an organ of the Federal Executive Council (the SFRY government);

b) meetings of the Inter-republic-provincial Committee for the Reform of Education which consists of secretaries for education from all republics and provinces, presidents of educational councils and the directors of institutions for the promotion of education (they agree on the co-ordination of laws, new models in reforms, curricula, etc.);

c) meetings of republican and provincial secretaries for education (organisational questions, international cultural links, etc.);

d) sessions of the Permanent Conference of delegates of the republican and provincial institutes for educational promotion and research (particularly co-operation in preparing specialist schemes connected with reform, in working out curricula, modernising education, etc.);

e) permanent or periodic meetings of other interested bodies from republics (universities, certain 2-year schools of higher education, textbook publishers, etc.).

It has been estimated that this co-operation has developed mainly on administrative-expert lines. A request has been made that the representatives of those who enact the main decisions and laws (the Assemblies of republics and provinces), i.e. those who should lead educational policy and who should decide on financing (self-governing communities of interest) participate more actively in this process.

II. THE POSITION OF THE REGIONAL ORGANISATION OF EDUCATION IN THE SYSTEM OF EDUCATION MANAGEMENT

A better understanding of the mechanism of organising education at the "medium" territorial level (communal and intercommunal), i.e. at the appropriate level of the organisation of the self-governing educational community of interest, presupposes probably an adequate knowledge of: a) the system of education in Yugoslavia, its republics and provinces, and the present reform of this system; b) the specificity of its social planning, the employment system and its link with education; c) the whole of the system of self-government in the field of education, and the distribution according to the level of responsibility - the rights and obligations for solving certain problems. A very concise explanation of this will be given: as a result, it will be somewhat simplified and will concern mainly those topics or matters that are solved in the same or similar manner in the whole country.

Changes in the Position of Education and in the Education System

In accordance with the principles of the Constitution and the ideological determination of the socio-political organisations (from 1974 onwards), the following strategic aims, i.e. resolutions, should be made in the reform of education:

a) Bringing education as an activity to the position where it really becomes a component part of "associated labour" (of all economic and social activities), where it contributes to the strengthening of self-government (productivity, etc.), and where the policy of education should be conducted on the principle of a free exchange of labour and resources, and through the self-governing communities of interest or directly by those employed in associated labour (firms and institutions) on the one hand, and those employed in schools and other working organisations of education, on the other. This obviously leads to further democratisation, allied to the decrease in the prerogatives of State power. For this reason, the ways and levels of self-government and government change so that they do not always coincide with the territorial system of power, nor with the assemblies of socio-political communities which also have self-government attributes.

b) Modernisation of goals, organisation, contents and methods of education which contribute especially to the all-round development of a socialist personality, its ideological determination, the promotion of commitment to self-government, developing a creative attitude towards labour, a feeling of brotherhood and unity, solidarity, humanism, etc., which should be contributed to by the school and all other factors of education. During the process of education, necessary knowledge should be gained, deriving from modern science, technologies and production - without overburdening pupils, and with their greater motivation towards and participation in self-government. Increased efficiency is demanded of schools (more guarantees for better performance in forms and school generally; more vocationally-directed preparation for needed occupations). The reform should ensure a better social position for and more effective work from teachers, etc.

c) Creating a new, global, flexible and cohesive system of education for youth and adults in accordance with the needs of associated labour, society as a whole and the individual, and in accordance with the concept of recurrent education and the policy of creating equal opportunities for all.

The new system of education in the republics and provinces has not yet been fully defined. The common characteristics, according to level (and to the main agencies responsible for the development of the network) are the following:

- Pre-school education is primarily for children aged 3-6, with an emphasis on developing ways of preparing for school (particular attention is paid to this by: local communities, enterprises and institutions, communes, communities of interest for immediate child protection and communities of interest for elementary education).
- Elementary education, lasting eight years, is compulsory for children from ages 7-15, is based on a general curriculum and is provided in elementary schools (the communes and communities

of interest for elementary education in the communes take special care of its development; and the communities of interest in the regions and republics take care, on the principle of solidarity, of the equalisation of capabilities and possibilities.

- Vocationally-directed education (instead of the former secondary education in various different schools and 2-year and 4-year higher education), which prepares for work and further education at various levels and in varying degrees. The basis which has been agreed on and which prepares for a certain job in a profession or occupation should be: a unified qualification scale of the degrees of expertise in a profession (consisting of 11 degrees, according to their complexity and without a distinct division on "manual" and "intellectual" occupations), and a new nomenclature of occupations.

At secondary-education level, there are two phases in most republics and provinces.

a) The first phase consists of a two-year educational course on a joint general-educational basis which is equal for all (but still not compulsory) and which is polytechnically orientated. Pupils have elective and optional lessons. Those who complete the second form may start working but also continue with further education while working, or may continue their education directly (in any field offered in the second phase). Regional and other self-governing communities of interest for vocationally-directed education, and the communes and regions take special care of this part.

b) The second phase of secondary vocationally-directed education is education for youth and adults lasting from six months to two years, which takes place in educational centres or schools for particular occupations. The second phase serves for preparing for skilled-worker status in a particular field, as well as for further education (2-year and 4-year higher education) in the same field. New curricula were planned to be introduced in Croatia and Vojvodina in 1977/78 and later in the other republics and provinces. In the transitional period general-education secondary schools, technical schools, schools for skilled workers and other schools from the former system still existed. The regional and republic community for vocationally-directed education deal with this level, meeting the needs of a certain kind of qualified personnel.

The prospect exists of a further stage of vocationally-directed education, at the 2-year and 4-year higher education level in the form of "education-while-working" or recurrent education. Namely, most graduate pupils from the second phase of secondary education should start work and - either while working or through the recurrent education system, and for the exceptionally talented - continue directly their higher education, which is also graded. Studying will depend not only on the interest of the individual, but also on the readiness of work organisations to finance the education of the highly-qualified managers they might need. A more serious reform of this level is to come. The programmes are being made more rational and are being modernised to correspond more to the needs of the economy and social services. Mainly communities of interest for vocationally-directed education at the level of the republics and provinces deal with this level, and sometimes special communities of interest for higher education. Self-governing communities of interest for vocationally-directed education organised at a regional or regional-branch level are also involved.

The Specificity of Social Planning and Employment

The functioning of the forms and mechanisms of organisation and management in education at various levels is affected significantly by the general social planning system in Yugoslavia and the forward-looking employment system.

Immediately after the Liberation, a very important instrument of development was the country's five-year development plan (from 1947 onwards) which was worked out in detail. Later, long-term planning was given up. In accordance with the Constitution (1974) "social planning" has now appeared - medium term for five years, long term for 10 years, and there is also annual planning. Planning is carried out in accordance with a specific Law on the Basis of Social Planning and in accordance with Yugoslavia's Social Plan (1976). There is also the right and obligation of workers, work organisations of local and socio-political communities (the commune, region, republic) and the self-governing communities of interest at various levels to co-ordinate their development and plans on a self-governing basis. The main trends in the development of society as a whole or of particular activities are determined by plans, as are requirements in management personnel and means by which this development is implemented. Because of the fact that planning starts at the same time from "above" and from "below", it possesses the characteristics of so-called co-ordinated planning.

For planning in education, especially vocationally-directed education, it is significant that this was previously planning for managers in enterprises and institutions and their associations. In the future, this will be done on the basis of a unified classification of occupations and methodologies.

Planning development is worked out globally through the medium- and long-term development plans of the local communities, communes, regions, provinces and republics. Schools and other educational organisations, on the basis of known factors, make their own development plans beforehand which they later co-ordinate with the general plans of the communes, regions, republics and provinces. Special agreements and compacts on the development of elementary and vocationally-directed secondary education, which are co-ordinated with the general balances of management requirements and resources, are made by the self-governing communities of interest of education.

In most republics and provinces there is an obligation to determine the basis of employment policy, and goals and means for their achievement - especially within the framework of the socio-economic development plans of the communes and intercommunal regional communities. The employment laws ensure the employment of new workers with secondary and 2-year and 4-year higher education. With the aim of better regulating the employment of new workers, and of carrying out advanced training and re-training of existing ones, accepting migrants,etc., special self-governing communities of interest in employment are set up at regional level, with basic communities in the communes, and a union, i.e. a similar form at the level of the republic (province). There are initatives for creating a union of communities at Federation level.

The Self-Governing System in Education "from above to below" and according to Type of Functions

With the aim of achieving a better understanding of the specific position of the regional organisation in society, and especially in education, it is necessary to explain in a few words the basis of the self-governing system in Yugoslavia, the organisational forms of self-government and government at certain levels in education and also the distribution of tasks, duties and authority of the bearers of self-governments and government.

a) One of the basic points of the socio-political system in Yugoslavia is the view held that the working class and all workers are the bearers of power as well as of management responsibility in social activities; they implement this by organising themselves into organisations of associated labour (firms, institutions, schools, etc.) and other self-governing units and socio-political organisations. They exercise their power and management functions through decision-making at meetings, referenda and other forms of personal expression of opinion. They do this in basic organisations of associated labour (which is the first independent way of organising the firms, or parts of firms, institutions or schools in which they work) and in the local communities where they live. In all these ways the working people have direct decision, and the communal assemblies and communities of interest are constituted on a delegational principle. The delegates are obliged to comply with the expressed will of the people voting. Decisions are taken in the assemblies. The participants in

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self-government can settle matters of common interest either by self-government agreements or social compacts.

The rest of the system, at "higher" levels, starts from this basis on a delegational basis. Delegates coming from the basic organisations of associated labour and the commune are delegated to the assemblies at republic (provincial) level. At regional level the assemblies consist of delegations from the communal assemblies. Delegates in self-governing communities of interest are elected mainly from the basic organisations of associated labour to be appointed to communal or regional, and then republican assemblies of communities of interest.

b) On this basis, it would be natural for the organisational forms of self-government at various levels to operate from the top downwards. However, having explained briefly on previous pages the structure of the basic organisations and the Federation, we shall now briefly outline the socio-political system at republic and the commune level, primarily in order to give a clearer picture of management in education.

1. At the level of the republics (province) we find:

- The republican (provincial) assembly with three councils: the socio-political council (delegates of socio-political organisations), the council of associated labour (delegates from associated labour) and the council of communes (delegates from communal assemblies). The assembly of the republic (province) enacts a Constitution, laws, social plans, resolutions, decisions, etc. The socio-political council and the council of associated labour have their boards for education and science which first discuss the proposals sent to the assembly, report on their implementation, etc.

- The executive council of the republican (provincial) assembly is the executive body of the assembly (government). It has executive and management functions. It also consists of boards dealing with particular fields among which one is devoted to education.

Among the secretariats acting as management bodies of the executive council there is also: a secretariat (in Slovenia a committee) responsible for educational affairs (in some places jointly with science, culture, etc.) which deals with governmental affairs, prepares proposals for laws and other acts and supervises the implementation of laws and assembly decisions. The republican (provincial) educational inspection is a component part of this body.

- The educational (teaching) council of the republics (provinces) is a special expert-management body of the republican assembly whose members (delegates, nominated, or by position) are prominent scientific, cultural, expert and socio-political workers. It mostly deals with drawing up curricula and approving textbooks.

- The institution for promoting education (the educational teaching institute) of the republic (province) is a specialised institution which prepares models of new reforms, school curricula, methodological instructions, does research and follows the advancement and development of education, participates in the advanced training of teachers, participates in the supervision of the work of schools, etc. In most republics and provinces there are special institutions, i.e. enterprises for publishing textbooks, school facilities, etc.

- Self-governing educational communities of interest at the level of the republic (special ones for elementary education, special ones for certain parts or the whole of vocationally-directed education) are, in fact, communities or unions of educational communities of interest set up in communes or regions, or according to activities. They deal with the policy of education at the level of the republic, the planning of development, determining norms, determining the rates of contributions to education, determining material and other conditions for equalising education, i.e. with the supplementary financing of communities and schools in underdeveloped areas, the financing of special schools and schools for different nationalities, giving scholarships, ensuring proper conditions for the work of teaching services and the advanced training of teachers, the coordination of the work of communities in the communes and regions, and according to activities, etc. In some republics and provinces, the republican communities of vocationally-directed education plan capacities directly and finance secondary schools and the 2-year and 4-year schools of higher education.

The assemblies of the communities of interest make decisions together or in two councils: the council of those rendering services and the councils of the utilisers of services. Boards and committees for various topics are set up. The delegation of the assembly of the community of interest can, if necessary, participate on an equal basis in the work and decision-making of the republican assembly.

Having in mind the constitutional principles, "the power" of the republican (provincial) assemblies and their internal and executive bodies should be transferred as much as possible to the educational communities of interest and other social activities. In the future less and less educational material of a normative type (laws, plans, programmes, norms for teachers, etc.) will be determined by laws and regulations (because now the legislator is not at the same time determining the financial resources). This will be done more and more through forms of self-government agreements in the communities of interest, where, on the principle of a free exchange of labour, those involved can determine the quality and quantity of demands and the means for implementing them.

This process, however, does not take place without difficulties. On the one hand, tradition is on the side of those structures which are most expressed in a traditional form. On the other hand, experience of the latter is insufficient, and they are not well enough equipped (specialised management has remained mainly with the previous bodies, and is obliged to assist the organs of the communities of interest; and in order to save money, the communities of interest are still not sufficiently developing their own expert departments, etc.).

2. At the level of the commune, partly by analogy with the situation in the republics (provinces), the following bodies are active:

- The communal assembly,(with the three councils mentioned, which can form boards and committees of education). In relation to education, the assembly mainly performs activities which are identical in relation to other work organisations. This is because its major job (planning the network, setting norms, financing) has been taken over, in the field of elementary education, by the elementary-education communities of interest, and for secondary and higher education by communities of interest for vocationally-directed education in the regions or republics (provinces). In the assemblies different interests are co-ordinated, the extent of budgets for education are determined, etc. Recently they have become involved more with ensuring enrolment for the first phase of vocationally-directed education.
- The executive council is an executive body, which in particular prepares reports for the assembly, implements its decisions, co-ordinates the work of the communal management bodies (the secretariat, departments, etc.). Supervision over the legal aspects of running schools is carried out by the educational inspectorate, as a management body.
- Institutions for the promotion of education (educational-teaching institutions) deal with school inspection and supervision and teachers' advanced training. They serve not merely one but several communes. They are therefore mostly regional. Some of them have their offices in the communes.
- Self-governing communities of interest for elementary (and pre-school) education in the communes (in Belgrade there are basic communities at communal level), govern the entire educational policy in their area: planning, the development of the network, providing financial resources, providing school-attendance facilities (e.g. school canteens, transportation, free textbooks, etc.), providing facilities for the educational-teaching service to operate, for the advanced training of teachers, etc. It is planned that basic communities within the communities of interest should be formed in the larger

(central) elementary schools, and in every school in the local community - themselves the basic-community unit of the communities of interest. This should enable a free exchange of labour (between workers in education and the "users" involved, i.e. mostly citizens from the local community) to take place more directly.

Those self-governing communities of interest for vocationally-directed education which are set up at a higher level than the commune, i.e. on a non-territorial principle, may have, in the communes, their own basic communities (or one common to all secondary schools). In schools and school centres, units of communities of interest for vocationally-directed education are created in which an immediate exchange of labour and resources takes place (i.e. programmes and money) between those employed in the school or centre, and the working people employed in enterprises and institutions which need certain management personnel.

Under the terms of the Constitution, delegations of educational communities of interest participate at communal level in the work of communal assemblies.

c) From all that has been mentioned, it is obvious that with this branch-structured system of managing and leading education, no unified, central point covering all aspects of everything exists. There is very considerable distribution of functions, complying with the doctrine of the withering away of the State in social affairs, in which education is included. Responsibilities and jurisdictions do not extend only from "top" to "bottom" (in the assembly system and the government system), but are transferred to the self-governing educational communities of interest. As has already been mentioned, the schools have proportionately more rights. Those employed in them can transfer certain rights, usually for a given period of time, to more complex school organisation (a central elementary school), an educational centre of vocationally-directed education (as a complex organisation of associated labour); to the community of schools or faculties, self-governing communities of interest, etc. The delegates of the communal assembly and assemblies of educational communities of interest can, by virtue of acquired authority, make a social compact or self-government agreement, and enable matters of common interest to be resolved at a "higher" joint level, e.g. in the region (intercommunal community, or self-governing community of interest at regional level, etc.).

It is possible that in practice a certain dynamism appears, derived from a detached (from above), or agreed-on (from below) attribution of responsibility for a particular topic, for a certain period of time.

This must be present whenever resolving any problems. The old bearers of responsibility remain for some of them, which only means that part of the rights and responsibilities is transferred to others.

In this way, for instance, the educational legislature remains under the jurisdiction of the republican (provincial) assembly.(1) But there is a tendency for it to be decreased in size and for it to ensure primarily a unified system and the rights of the citizens, pupils and students, compulsory primary education and the initial preparation to working life. Some of the matters which were previously regulated by law are now additionally regulated by social compacts and self-government agreements between those involved, by statutes and other normative self-government enactments for schools and educational communities of interest. These enactments will regulate, inter alia, norms concerning space, facilities, norms for the number of pupils, etc. Because of these trends, the functions of the educational management bodies (secretariat, educational councils, etc.), are necessarily changed, i.e. reduced. At the same time, there appears a need for the self-governing bodies to take over certain regulations, and find specific new ways of supervising the implementation of their decisions. In connection with this, expert services in education (institutions, etc.) are turning more to schools and self-governing communities of interest than to management. Special self-governing social control bodies are formed.

In some republics (i.e. provinces, e.g. Vojvodina), instead of about ten comprehensive laws for various levels and kinds of education, a unified Law on the Education System has been adopted (1977).

Enough has now been said about planning in education. It starts, based on the common principles which apply for the whole Federation, from the bottom, in schools, and takes place principally in the communities of interest (because they provide the financial resources) but is co-ordinated on each of the territorial levels: local community, commune, region and republic (province).

In order to ensure the necessary unity of the education system in the republic (province), the common basis of the curricula of primary and secondary education is set by the republic (province). Two-year and four-year schools of higher education devise curricula independently, taking into account the requirements of those for whom they are preparing management personnel, and the requirements of the self-governing communities of interest. However, at other levels too, the "determined" programme is also not completely definite. In elementary education, for example, schools are obliged to adapt part of the curriculum to the needs of the environment. Local communities, communes, communities of interest and even regions have a

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1) As has already been said, the Federation determines, in accordance with the Constitution, the laws on planning, on associated and other types of labour, the principles for providing, for instance, an equal socio-economic position for education as a part of associated labour, free exchange of labour, the functioning of self-government, etc., but these are also implemented in the republic (province).

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decisive say. In secondary education the curricula of elective classes are determined by agreement at communal and regional level (including self-governing communities of interest). Parts of the curricula which in the second phase of vocationally-directed education serve more directly in preparing for a particular occupation and level are determined by representatives of the schools and interested firms and institutions jointly, and with the help of self-governing communities of interest and expert teaching services.

- Advanced training of teachers, for which financial resources are provided by the self-governing educational communities of interest, depending on the content (general teaching, ideological and expert content, etc.), is provided by these various bodies (the schools themselves, school teachers, the educational-teaching service, some individuals, etc.). Depending on the needs and sometimes the possibilities, some of the responsibilities are distributed according to level (in schools, within the framework of the commune, the region and republic).

- Financing of all forms of education has almost entirely been transferred to the self-governing educational communities of interest. On the basis of the agreements between and amongst them, the community which will finance a certain school programme is determined, along with which financial resources will be used. In accordance with this, the self-governing communities of interest become the founders or co-founders of schools (apart from the commune, republic and others).

In such a complex organisation and structure, the institutions for the promotion of education (the educational-teaching service) appear to play more of a development than a supervisory function, mainly at republic and region level, and they also serve the needs of the communal and republican assemblies and their bodies, as well as the educational communities of interest and schools.

III. COMMON CHARACTERISTICS OF THE REGIONAL EDUCATION ORGANISATION SYSTEM AND SELF-GOVERNMENT IN THIS FIELD

From what has been said, the conclusion may be drawn that as things stand at present, the following types of regional organisation in the field of education may be distinguished:

a) The Intercommunal Regional Community as a formalised form of the region. This appears only in some republics. In the territorial regionalisation of a republic or province, this form represents, above all, an agreed-upon associated community of several communes or a town with a special status and division on communes (Belgrade, Zagreb). The regional community has its own regional (intercommunal) assemblies, promotes the development of regional self-governing communities of interest and the Chamber of Commerce, and creates or helps create one or more special bodies or services for certain kinds of jobs (internal affairs, transportation, law, employment, statistics, the educational-teaching service, etc.).

For the moment, this community, according to the Constitution, does not have all the immediate prerogatives of a socio-political community (such as a commune or a republic) but only those obtained by agreements of communities, as well, perhaps, as by transferring some of the jurisdictions of the republics (provinces) to a particular body in the region.

The region is otherwise a rather homogeneous socio-economic and cultural entity, with one or more centres (because some institutions can be in one, and others in another place), which also has relatively good connections with other places. It does not correspond entirely territorially to the geographical region. The assembly of the regional community is the highest organ of government or decision-making by agreement. School delegates participate in the work of the regional assembly through their commune's delegation.

b) The Self-Governing Educational Community of Interest as an independent factor in the regional organisation of education. In those places where no region exists formally as a type of socio-political community, the community or union of self-governing communities of interest for elementary education, which is set up by agreement for the area covered by several communal communities, may perform the function of a regional organiser and director for that level of education. This makes the communities of interest for vocationally-directed education virtually always larger than the commune for a certain area, especially if it is organised on the basis of activities. Delegates of schools and the firms and institutions in a certain field are present at the assembly of the community for vocationally-directed education in the case of certain professions (electrical engineering, agriculture, etc.) for one area. Since the distribution of schools and firms is not territorially uniform, the community of interest for vocationally-directed education organised by occupation does not have to coincide with the territory of the educational community of interest for other occupations or fields, and an overlap occurs. Schools' participation in the management of communities of interest is provided by the delegational system.

c) The Regional Institution for the Promotion of Education as a factor in the regional linking of primary and secondary schools. The

Institution whose activity has been described operates over the area covered by several communes. It organises research work, follows - for the needs of the communes and the self-governing communities of interest - the development of the network, performs educational and teaching supervision, assists schools in modernisation, participates in the advanced training of teachers, organises consultations on its territory, works out common norms, etc. The institutions are responsible to the communes and the educational communities of interest which finance them. The schools' delegates influence their work through the educational community of interest. Apart from this, the institutions have in their council - as an organ of self-government - representatives of the social community, i.e. external members amongst which there are delegates from certain schools. The institutes also form certain expert councils, boards and commissions whose members are prominent teachers and sometimes top experts from enterprises and institutions.

d) Universities, faculties and 2-year schools of higher education, including teacher-training schools. A widespread network of these forms(1) affects the organisation of education (in general there is a laid down or natural territory for enrolment: schools of higher education participate in the advancement of teachers, etc.). The presence of schools of higher education is felt especially when there formally exists an intercommunal regional community. The schools of higher education work to create their own region. The link along the self-governing line is weaker than in other forms, especially on account of the relatively strong reservation of some higher-school institutions.

In the further analysis the situation is assessed having in mind primarily the forms under a) and b).

IV. AN ASSESSMENT OF THE PRESENT RESULTS OF REGIONAL ORGANISATION

The processes of regional organisation in society as a whole and especially in education are under way. Up to now, there has been no systematic research on the phenomena. It is only possible, just by considering what has been done, above all by the specialised services, to say:

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1) Outside the republican-provincial centres (Ljubljana, Zagreb, Sarajevo, Titograd, Skopje, Belgrade, Novi Sad, Pristina) there are new universities in larger towns such as: Maribor, Split, Rijeka, Osijek, Tuzla, Mostar, Banja Luka, Kragujevac, Nis, etc. Faculties, academies of art and 4-year schools of higher education (165 in 1975/76) and 2-year schools of higher education (131) also exist in other towns. By performing their function they, for their part, augment the informal regionalisation.

- what the suppositions were as to the possible contribution of regional education to regional development and which phenomena have appeared in practice concerning this, and
- how the effect of regional organisation on education is felt, i.e. what is felt in practice.

a) It was thought that regional organisation would particularly make it possible for: the general, necessary integration of all forms of life and work at regional level to be increased; the requirements for qualified personnel to be better perceived, and in connection with this, the educational needs, especially on one's own territory; the necessary types of schools to be provided, particularly secondary vocational schools and that only the necessary forms of higher education be developed in a region; that graduate pupils and students be provided with employment in the region; most primary school leavers to continue their education in the first phase of secondary education - at the nearest school - and in that way improve the conditions for educating children from various environments; to increase savings by a more rational organisation of the primary and secondary education network; strengthen the immediate interest of the citizens and working people in the general problems of the development of the region, including an interest in education, etc.

In some of these and other fields, some successful achievements were noticed, though some problems also arose.

It is certain, for example, that those with high intellectual capacities (senior experts and cultural workers) who were rather confined within schools, started to undertake wider social tasks when the regional centres were formed, and to put their knowledge at the disposal of the regional community. In this way they influenced integration more strongly and contributed to faster development.

Since the reform of secondary and higher education and the new system of social planning have imposed a need for better planning of economic and educational needs, and this was difficult to bring about only at the republic ("distant") or the commune ("narrow") level, the region appeared as a good link. This is already having a positive effect on the planning of the network and school capacities. More time will be needed for this mechanism to start working well and to start showing appropriate results.

Concerning the savings gained by the rationalisation of the school network, this can for now only be discussed theoretically, because total expenses are not decreasing. On the other hand, rationalisation by creating large educational centres with 2,000 and more pupils exhibits some negative aspects (there are great difficulties involved in the closer, more direct teaching work, the possibilities for greater participation by teachers, pupils, parents and delegates of society in self-government are decreased, etc.).

Attendance at secondary schools is being improved (9 per cent of pupils who have completed primary education continue their education). But this may not necessarily be an effect of regional organisation - although in some places where regions exist, the situation is somewhat better. On the whole, interest in education has increased (on account of employment, the prospects opened up by the reformed school system). It has been noticed, however, that increased social interest in education (including contribution by extra investments), has the effect of broadening interests in other, allied spheres and also greater socio-political involvement in the forms of immediate self-government and in the delegational system.

It has been observed that the public and cultural activity of schools is spreading further than the local community and commune (work with adults, various forms of entertainment, public competitions, research work, publishing activities, etc.).

As might have been expected, regional organisation has sometimes given a boost to interest in the development of some forms of education which are even outside the framework of real needs. A large number of regions, for example, wish to have their own 2-year or 4-year schools of higher education. Satisfying some of these needs would lead to an unplanned and excessive (even now it is too large)(1) expansion of higher education, which would finally have a negative effect on the region and later more widely on the community. The present network and capacities of 2-year and 4-year schools of higher education are rather extensive, scattered and out of the large city centres, which means that they are more accessible than previously to children from all economic strata.

Finally, there are chances that the regional planning of economic and educational capacities will - in co-ordination with the real possibilities of employment - positively affect, to a certain extent, the decrease in migration.

We should add to this the fact that "regional" as well as other sectoral interests in some way express a form of selfishness in relation to others. For instance, the less-developed regions are demanding, in addition to what they receive according to the agreement on realising solidarity, even further financial resources (giving as a reason the further equalisation of conditions, etc.). The more developed regions, on the other hand, emphasise their specific natures, indicate their increased demands and needs, and demand that more money be appropriated.

b) Much can be said not merely about the suppositions, but also about the more acutely-expressed positive effects of regional organisation on education.

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1) In Yugoslavia in 1977/78 there were more than 403,000 students.

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Before organisation took a regional form, particularly in smaller communes, interest in the development and greater accessibility of secondary education was not very great, nor was it for increasing education in the languages of the different nationalities, for broadening the network of special education for mentally and physically handicapped children, for the primary and further education of adults, pupils' hostels, etc. This was mainly because the individual problems were solved in the republics. Interest was then greatly increased in these communes and in the whole region. More initiative is being taken so that with supplementary investment and money acquired by voluntary donations and other means, the development of the different forms may be speeded up. This also applies to efforts made in modernisation (investing in equipment which may be used by several schools, etc.).

Planning and greater care at regional levels particularly positively affect the stability of the work of schools and teachers. Numerous changes are planned by the reform, including a decrease in the number of subjects, the number of lessons, etc. A number of teachers felt jeopardised because they were afraid they would become redundant in some schools. Now that development and changes (the school network, capacities, number of pupils and teachers) are being planned, it is possible to take measures,e.g. for the exchange of teachers to be made on time, and to ensure measures for their requalification. There is also a wider material basis for bringing about solidarity (if, for instance, someone who is redundant has subsequently to be kept in employment).

The present reform of education is being brought about more successfully in those places where the regional factor is included. The institutions for promoting education, within the framework of the regions, are responsible - which was not previously the case - for the schools in all communes on whose territories they are active.

The content of lessons is enriched not only by local topics concerning the local community and the commune, but also broader topics. It is then much easier to forge a link between schools and work organisations. Schools are enabled in a greater measure than before to use means of production for the practical productive work of pupils. Engineers and technicians come to schools more often as instructors in certain activities. It cannot be said that this is mainly and primarily the result of regional organisation, but it demands planned political action as well as self-government at all levels. However, it is quite certain that improved regional organisation has given extra impulse to this.

At all regional levels, much more attention is paid, according to common criteria, to the equalising of the conditions of life and work of schools in environments that are developed to a different extent economically.

Résumé du rapport technique N° 11

L'AUTOGESTION ET LA POLITIQUE D'EDUCATION AU NIVEAU REGIONAL EN YOUGOSLAVIE

par
M. Juhas

Le rapport rappelle tout d'abord les aspects spécifiques du système socio-politique yougoslave ainsi que la définition des termes de base. La Yougoslavie est un Etat socialiste fédéral composé de 6 républiques et de 2 provinces autonomes ; elle constitue une communauté volontaire de nations. Ces républiques ne sont pas des régions mais des états basés sur la souveraineté des peuples et sur l'autogestion ouvrière. L'enseignement ne relève pas de la compétence fédérale mais de celle des républiques dans le cadre des collectivités socio-politiques (communes), locales (quartiers, villages) et économiques (associations de travailleurs) et conformément à un mode d'organisation autogestionnaire. Elle est administrée par des "collectivités autogestionnaires d'éducation" qui sont des assemblées formées de représentants du personnel de l'enseignement et d'autres branches d'activités.

Dans l'enseignement primaire, ces collectivités sont constituées au niveau de la commune par les délégués du personnel, des résidents et des autres collectivités locales. Dans l'enseignement secondaire et supérieur, ces collectivités peuvent fonctionner au niveau d'une région ou d'une république et être spécifiques à chaque secteur de formation et d'emploi.

Les pouvoirs de décision de l'Etat, des républiques et des communes ont été transférés aux collectivités de travailleurs : il y a eu à la fois décentralisation, désétatisation et renforcement de l'autogestion et de la démocratie.

Les assemblées de ces "collectivités d'éducation" élisent des délégués qui, sur la base des principes de l'autogestion, définissent les orientations de la politique d'enseignement, le réseau et la taille des écoles, les normes de recrutement des enseignants, le montant des crédits et le mode de financement, les relations avec les autres collectivités (et les aides réciproques). Au sein de chaque établissement existe un "conseil scolaire" qui - sur la base de principes généraux établis par les républiques ou les collectivités - détermine les programmes d'études et les diverses activités d'éducation. Ce conseil élit un bureau, établit le budget, nomme le directeur, gère le personnel et détermine les niveaux de traitement du personnel en fonction des résultats de leur travail. Sur certaines questions (résultats du travail, gestion financière, statut de l'école) les délégués des collectivités participent aux débats du conseil.

Il n'existe pas à proprement parler d'organisation au niveau régional ; toutefois, on note une tendance à aborder les problèmes à un niveau inter-communal, notamment en Serbie où se sont constituées 9 "aires économico-géographiques" regroupant des communes autour de villes, et dans les zones à forte densité de population. Cette régionalisation exprime le souci des collectivités et des communes de traiter les problèmes d'intérêt commun sur une base plus large à un niveau intermédiaire entre la république et la commune. Toutefois, la commune demeure la base du système socio-politique yougoslave grâce à ses assemblées et ses conseils ; les dimensions des communes sont très variables ; certaines constituent de véritables régions. Malgré des possibilités de création de collectivités au niveau régional et inter-communal, on note souvent une résistance à créer un niveau d'organisation sociale nouveau.

Les relations entre les collectivités socio-politiques et les collectivités autogérées existent à différents niveaux grâce à un système de délégation de pouvoirs ou de réunions conjointes des assemblées. Au niveau fédéral, les relations sont établies sur la base des principes de la Constitution, à travers des échanges d'expériences et une coopération constante qui, en matière d'éducation, intervient dans divers domaines (programmes d'études, recherche, édition de manuels). Divers organismes existent à cet effet (Comité fédéral pour la science et la culture, Comité de réforme de l'éducation, Conférence des secrétaires provinciaux pour l'éducation).

L'ORGANISATION REGIONALE DE L'ENSEIGNEMENT DANS LE SYSTEME D'ADMINISTRATION SCOLAIRE

Un nouveau système d'enseignement a été conçu sur la base de principes tels que :

i) faire de l'éducation une composante du travail associé (qui permet aux travailleurs de décider de la répartition du revenu), un moyen de renforcer l'autogestion, et de décentraliser au bénéfice des collectivités ;

ii) moderniser le contenu et les méthodes d'enseignement ;

iii) créer les bases d'une éducation permanente, etc.

Il est constitué d'un enseignement pré-scolaire de 3 ans, d'un niveau élémentaire de 9 ans et d'un niveau à finalité professionnelle regroupant les enseignements secondaire et supérieur, général et technique préparant à une échelle de qualifications après deux ans de formation commune. Le système éducatif fonctionne au sein d'une planification sociale en relation avec les plans et les actions coordonnés des organisations socio-politiques et des "collectivités autogestionnaires" et en tenant compte des besoins en cadres des entreprises et des besoins en emplois des républiques. A la base, les travailleurs assemblés au sein des organisations de "travail associé" décident directement (par vote, référendum, etc.) et désignent des délégués qui doivent respecter ces décisions. Aux niveaux plus élevés, le même système de délégations de pouvoirs est adopté pour désigner les membres des conseils exécutifs (Secrétariat pour l'éducation des républiques) ; des organes techniques (conseil pédagogique, institut pédagogique) y sont adjoints. La politique est définie au niveau de la république par la fédération des collectivités locales réunies en assemblées, mais on enregistre une tendance à des transferts d'attribution vers les unités locales. Au niveau des communes, les organes existants sont l'assemblée communale, le conseil exécutif, l'institut pédagogique (le plus souvent régional), les collectivités autogestionnaires des établissements primaire et pré-primaire. Le transfert des attributions tend à réduire l'importance des lois et règlements au bénéfice des décisions prises à la base ; les fonctions des organes administratifs changent et diminuent ; des fonctions de contrôle apparaissent. La formation des enseignants relève de différents niveaux ; le financement est assuré par les collectivités de base.

En conclusion, le rapport montre que divers modes d'organisation de l'enseignement au niveau régional peuvent être identifiés :

- la collectivité inter-communale est une forme d'organisation régionale, une entité culturelle et socio-économique homogène, gérée par une assemblée composée de représentants de collectivités de base ;
- les collectivités autogestionnaires d'éducation sont un élément d'organisation régionale dans ce secteur, notamment en ce qui concerne le niveau des études à finalité professionnelle (secondaire) ;
- les instituts pédagogiques régionaux sont un élément de coordination entre les établissements primaires et secondaires ;
- les établissements post-secondaires exercent des fonctions à un niveau régional.

Ce système d'organisation régionale en cours d'application peut déjà faire l'objet d'une évaluation :

i) Il facilite l'intégration des différentes formes de travail et de vie, l'identification des besoins en cadres, des besoins en formation et des types d'écoles secondaires et supérieures nécessaires, l'affectation des ressources ; la région crée un lien entre la république et la commune ; l'intérêt de la collectivité pour l'enseignement est plus développé quand une organisation régionale est mise en place ;

ii) Les conditions d'accès aux établissements sont améliorées ; le rôle culturel de l'école est plus évident ; les possibilités d'innovation sont plus étendues et la gestion du personnel en est améliorée. La réforme du système a été facilitée là où existe une organisation régionale.

Rapport technique n° 12

LA REGIONALISATION DE L'ENSEIGNEMENT EN ITALIE

par

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Rome

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I. LA REGION

1. ORIGINE DE LA REGIONALISATION

Les gouvernements régionaux sont entrés en fonction en 1972, soit 24 ans après l'institution des régions envisagées par la Constitution de 1948, selon laquelle la région est un élément fondamental de l'organisation politique de l'Etat italien.

Bien que l'héritage centralisateur du régime précédent continue d'exercer son influence (comme le prouve notamment le retard avec lequel les régions ont vu le jour), la Constitution pose le principe de l'organisation de l'Etat italien sous forme d'état "régional". A partir de cette définition, certains spécialistes affirment que la nature de l'Etat italien est proche de celle d'un Etat fédéral.

Ceci dit, il faut cependant rappeler qu'en matière d'enseignement la Constitution a évité de faire un choix régionaliste : c'est l'Etat qui demeure compétent . Il légifère sur les questions scolaires, et crée les écoles de tous genres et de tous niveaux ; c'est un examen d'Etat qui détermine l'admission dans les écoles et qui sanctionne la fin des études. La Constitution attribue pourtant certains pouvoirs à la région en matière d'enseignement artisanal et professionnel, d'aide scolaire aux élèves et en matière de constructions scolaires. A partir de 1972, ces secteurs ont donc relevé de la compétence des régions nouvellement constituées, qui ont alors entrepris de les réglementer et de les administrer. Le transfert des pouvoirs de l'Etat aux régions a été achevé et défini de façon concrète par le décret n° 616 du 24 juillet 1977.

En bref, on peut dire que le secteur de l'enseignement se divise en deux parties : l'une, la plus importante, relève toujours des pouvoirs de l'Etat et l'autre, des pouvoirs des régions. L'opération de délimitation des deux sphères de compétence n'est toutefois pas achevée. La constatation que l'on peut faire pour l'instant est que si les attributions des régions ne sont pas encore nettement définies, c'est parce que le texte constitutionnel n'est pas clair à cet égard (rappelons que 25 ans ont passé entre la promulgation et l'application de ce texte).

Dans le domaine de l'enseignement, l'Etat italien n'a pas fait un choix nettement régionaliste comme ce fut le cas pour d'autres secteurs sociaux (celui de la santé, par exemple). Par contre, un processus de décentralisation s'est produit au sein même de l'Etat, qui a contribué à promouvoir la participation de la "base" à la gestion des établissements scolaires. Ces pouvoirs décentralisés ont été instaurés en 1973 et 1974. Nous nous trouvons donc confrontés à deux processus de décentralisation parallèles : (i) l'un fondé sur l'attribution d'un certain nombre de pouvoirs aux régions ; (ii) l'autre fondé sur la création d'organismes autonomes au niveau de la province et du district dans le cadre même de l'enseignement public.

Nous allons donc exposer et développer les conséquences et les problèmes liés à ces deux formes de décentralisation.

2. SIGNIFICATION DE LA REGION DANS LE SYSTEME POLITIQUE ITALIEN

En Italie, la notion de région désigne une entité juridico-administrative : la région est une instance politique territoriale. Chaque région politique a été créée à partir du territoire et en conservant le nom des régions historiques et géographiques de l'Italie ; en d'autres termes, il s'agit de zones géographiques caractérisées par une forte tradition historique unitaire et par une grande homogénéité culturelle (presque toutes les régions ont leur dialecte).

Les régions, au nombre de vingt, ont des dimensions variées, mais leur superficie moyenne est considérable.

Les régions italiennes

	Répartition de la population en pourcentage
Piémont	8,1
Val d'Aoste *	0,2
Lombardie	15,8
Trentin A. *	1,6
Vénétie	7,6
Frioul V.J. *	2,2
Ligurie	3,3
Emilie-Romagne	7,0
Toscane	6,4
Ombrie	1,4
Marches	2,5
Latium	8,8
Abruzzes	2,2
Molise	0,6
Campanie	9,4
Pouilles	6,7
Basilicate	1,1
Calabre	3,6
Sicile *	8,7
Sardaigne *	2,8
ITALIE	100,0

* Régions ayant un statut spécial. Dans ce rapport on se référera presque toujours aux régions dotées du statut ordinaire.

3. POUVOIRS DES REGIONS

Les régions disposent d'un pouvoir législatif dans les domaines suivants : police locale urbaine et rurale, foires et marchés, assistance publique et aide médicale et hospitalière, enseignement artisanal et professionnel, aide scolaire aux élèves, musées et bibliothèques des organismes locaux, urbanisme, tourisme et industrie hôtelière, transports d'intérêt urbain et régional, aménagements, aqueducs et travaux publics d'intérêt régional, navigation et ports lacustres, eaux minérales et thermales, carrières et tourbières, chasse, pêche dans les eaux intérieures, agriculture et forêts, artisanat.

Ce pouvoir législatif s'exerce dans les limites des principes fondamentaux fixés par la Constitution et par les lois de l'Etat. En outre, ce sont les régions qui assument les fonctions administratives dans les domaines énumérés ci-dessus. Par délégation de l'Etat, elles peuvent aussi être chargées d'exercer des fonctions administratives dans tout autre domaine. Cependant, la région n'exerce pas directement ces fonctions administratives car elle est un organe législatif et de planification, et non d'exécution. La Constitution stipule en effet (article 118) que la région exerce ses fonctions administratives en les déléguant aux organismes territoriaux de niveau subrégional tels que les provinces et les municipalités. La région est financièrement autonome. Sur le plan fiscal, elle peut imposer ses propres taxes. L'essentiel de ses ressources provient de sa part des impôts prélevés par l'Etat et redistribués par un fonds de péréquation, lequel tient compte des conditions économiques et sociales des différentes régions.

4. ROLE DE LA REGION EN MATIERE D'EDUCATION :
L'AIDE AUX ELEVES

En matière d'aide scolaire, les tâches des régions sont définies par la loi de 1972 sur le transfert des pouvoirs de l'Etat aux régions, ainsi que par la législation régionale qui y a fait suite.

L'aide scolaire comporte un ensemble d'activités et de mesures sociales destinées à subventionner les transports et les cantines scolaires, à rembourser des livres de classe aux familles les plus modestes, à financer les bourses d'études et à intervenir dans d'autres domaines de moindre importance.

Premiers résultats obtenus

Sur la base de l'analyse des lois et des mesures prises, des décisions de financement accordé et du témoignage de nombreuses écoles et municipalités, on peut relever les premiers résultats de ces récentes interventions régionales :

a) L'attribution aux régions de pouvoirs dans le domaine de l'aide aux élèves a entraîné une nette augmentation des ressources financières destinées à ce secteur. On peut noter (tableau 1) que les dépenses moyennes par habitant, qui étaient de 1.009 lires en 1972 (dernière année du régime d'Etat), avaient plus que doublé dans la plupart des régions en 1974, c'est-à-dire après deux années d'application du régime régional.

b) Le système de financement des régions par le fonds national de péréquation a bien fonctionné. La dépense par habitant est nettement supérieure dans les régions méridionales, où le revenu par habitant est le plus bas (Basilicate, Calabre, Molise) et où le taux d'échecs scolaires est le plus élevé (tableau 3).

Tableau 1

DEPENSES PUBLIQUES D'AIDE SCOLAIRE PAR HABITANT ET REVENU PAR HABITANT DANS LES REGIONS A STATUT ORDINAIRE

Régions	Dépenses d'aide scolaire - 1974 (lires)	Produit intérieur brut par habitant 1973 (milliers de lires)
Piémont	2. 672	1.852,4
Lombardie	1.329	1.992,1
Ligurie	2.280	2.036,7
Vénétie	1.097	1.492,5
Emilie-Romagne	1.235	1.755,5
Toscane	1.598	1.557,0
Marches	2.531	1.309,5
Ombrie	4.026	1.273,8
Latium	1.782	1.557,2
Abruzzes	3.099	1.056,4
Molise	4.658	811,0
Campanie	1.688	982,5
Pouilles	3.394	1.028,6
Basilicate	5.054	862,5
Calabre	3.239	809,0

Dépense moyenne par habitant en 1972 lorsque l'aide scolaire était encore dispensée par l'Etat : 1.009 lires

Source : CENSIS

c) Lorsqu'on analyse la politique suivie par les diverses régions et les variantes, d'une région à l'autre, dans la ventilation des dépenses par type d'école et par type d'intervention financière, on note que, au cours de ces trois années, le transfert de cette responsabilité de l'Etat aux régions a produit des changements positifs qui méritent d'être signalés :

Tableau 2

DEPENSES D'AIDE SCOLAIRE PAR ELEVE DANS LES TROIS CYCLES D'ETUDES, EN 1974/75

Régions	Ecole maternelle	Ecole obligatoire	Ecole secondaire de second cycle
Piémont	11.970	16.160	16.940
Ligurie	15.710	11.710	19.400
Vénétie	4.200	3.240	15.620
Emilie-Romagne	5.970	5.580	12.270
Toscane	6.400	7.990	15.280
Marches	8.110	11.690	22.830
Latium	5.130	8.070	11.900
Abruzzes	8.460	17.220	15.040
Molise	29.350	22.321	23.350
Campanie	1.440	5.760	17.900
Pouilles	9.250	14.290	24.690
Basilicate	27.630	14.700	43.790

Source : CENSIS

Tableau 3

POURCENTAGE DE JEUNES DE 15 A 19 ANS N'AYANT PAS OBTENU LE DIPLOME DE FIN D'ETUDES OBLIGATOIRES

Régions	%
Nord	33,3
Centre	31,6
Sud et îles :	49,2
- Abruzzes	34,6
- Molise	38,3
- Campanie	50,1
- Pouilles	50,3
- Basilicate	47,0
- Calabre	52,3
- Sicile	52,0
- Sardaigne	44,5
ITALIE	40,6

Source : CENSIS, d'après les données de l'ISTAT (recensement de 1971).

Tableau 4

POURCENTAGE D'ELEVES TERMINANT LEURS ETUDES PRIMAIRES SANS AVOIR REDOUBLE

	Inscriptions en première année en 1968-69	Fin du cycle d'études 1973
Italie du Nord	100,0	79,8
Italie Centrale	100,0	80,8
Italie méridionale et îles	100,0	61,7
Total pour l'Italie	100,0	71,7

i) Le système actuel permet de tenir compte de l'inégale répartition des besoins à travers le territoire, alors que le précédent régime d'Etat ne pouvait prendre en considération que de façon très rudimentaire les diversités territoriales. Ce résultat a pu être obtenu grâce à la participation directe des usagers, des municipalités et des provinces et grâce à l'utilisation de coefficients particuliers de répartition des fonds, coefficients sensibles aux paramètres écologiques et socio-économiques ;

ii) Le système actuel permet une bien plus grande souplesse d'intervention que le régime précédent. Sous le régime d'Etat, les modes d'intervention étaient prescrits de façon précise et uniforme par les lois nationales pour l'ensemble du territoire ; il n'était pas possible de transférer des ressources d'un poste budgétaire à l'autre ; la gestion des opérations souffrait d'une bureaucratie excessive au sommet et d'une absence de responsabilités à la base. Actuellement, c'est la région qui définit les choix fondamentaux (privilégier certaines branches d'enseignement ou certains objectifs sociaux) ; ce sont les autorités locales qui assurent la décentralisation de la gestion et son adaptation aux besoins ; cette action peut même se faire au niveau des écoles (avec la participation des usagers à la gestion des écoles, par l'intermédiaire du conseil d'établissement).

iii) D'autre part, la mise en oeuvre du nouveau système ne va pas sans difficultés en raison du manque d'expérience et de l'absence de structures spécifiques d'intervention des autorités locales (municipalités et provinces) ; celles-ci se trouvent en effet appelées à assumer des responsabilités auxquelles elles n'étaient pas préparées. On estime que la création récente du district scolaire va permettre de les inciter à mieux programmer leurs interventions.

Comme nous l'avons vu, en général, la région n'intervient pas directement dans les domaines de sa compétence législative, mais elle doit en déléguer l'administration aux autorités locales subalternes. Tel a été le cas pour l'aide scolaire, système qui mérite d'être mentionné ici en tant qu'exemple de décentralisation. Le principe de la délégation découle du principe général qui détermine les caractéristiques et les fonctions des régions : la région est essentiellement une instance gouvernementale, c'est-à-dire qu'elle est le centre actif d'un système complexe d'organismes locaux, d'organes de planification et de contrôle mais qu'elle laisse les fonctions d'exécution aux autorités locales. Les régions ont essentiellement délégué l'aide à la scolarité obligatoire aux municipalités(1) et l'aide à l'école

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1) Elles sont environ 8 000 en Italie.

secondaire, post-obligatoire aux provinces(1) ; certaines régions (Campanie, Calabre, Molise, Piémont) vont accorder une délégation totale ou partielle au district scolaire qui est, nous le verrons plus loin, l'instance qui assure la participation à la gestion de l'école publique au niveau local (un district comprend une population moyenne de 73 000 habitants). La délégation des attributions au district scolaire représente le moyen d'associer à la "base" les deux processus autonomes et parallèles de décentralisation en matière d'enseignement dont il a été précédemment question, à savoir la décentralisation par "l'autogestion scolaire" et la décentralisation par l'attribution de pouvoirs aux autorités locales. Les municipalités et les provinces sont représentées au sein du district scolaire.

L'attribution des responsabilités en matière d'aide scolaire aux régions leur a posé quelques problèmes : (i) d'une part, comment interpréter la délimitation entre leurs pouvoirs et ceux conservés par l'Etat, (ii) d'autre part, comment assurer la coordination pratique des deux catégories de pouvoir.

Si l'on donne à l'expression "aide scolaire" le sens qui aujourd'hui lui convient le mieux - à savoir les interventions visant à promouvoir "l'égalité des chances" et le droit à l'instruction - il faut la concevoir comme une intervention qui ne se limite pas à distribuer simplement des aides économiques ou à assurer des services de nature extra-scolaire. On doit nécessairement se référer à des activités d'enseignement dites d'adaptation (les cours de rattrapage par exemple) et à une individualisation plus poussée de l'enseignement. Toutefois ce type d'activité ne peut être programmé et géré séparément de l'enseignement régulier. Devant cette difficulté, le Gouvernement a préféré donner aux régions des pouvoirs restreints et ne leur laisser que l'aide scolaire "non éducative", c'est-à-dire la fourniture de services matériels extérieurs au processus éducatif (cantines et transports) ainsi que des aides en espèces pour les bourses d'études et l'achat de livres de classe.

L'intervention de la région dans la politique d'éducation (et, par son intermédiaire, des municipalités et des provinces), même s'il ne s'agit que de quelques domaines annexes et bien délimités, a inévitablement développé ou éveillé l'intérêt de la collectivité locale pour une participation globale, et non plus seulement sectorielle, à la politique d'éducation ainsi que pour une solution à la crise et aux difficultés de fonctionnement de l'école publique. On en trouve la preuve dans le fait que, malgré leurs difficultés financières, de nombreuses villes moyennes et grandes ont organisé des activités éducatives complémentaires à celles de l'Etat bien qu'elles n'y aient pas été tenues par la loi.

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1) Il y a 100 provinces.

5. ROLE DE LA REGION EN MATIERE D'EDUCATION : L'ENSEIGNEMENT PROFESSIONNEL

Tout comme pour le secteur de l'aide scolaire, en 1972 l'Etat a transféré aux régions les pouvoirs relatifs à "l'enseignement professionnel et artisanal". Antérieurement, ce secteur et l'organisation de la formation professionnelle se subdivisaient comme suit :

a) l'enseignement professionnel assuré par les écoles dépendant du ministère de l'Instruction publique (instituts professionnels d'Etat et instituts techniques) ;

b) l'enseignement professionnel a plein temps ou à temps partiel (apprentis) dispensé dans les Centres de formation professionnelle extra-scolaire financés par le ministère du Travail et placés sous sa tutelle.

Ce second type d'activités de nature extra-scolaire a été transféré intégralement aux régions. Par contre, les pouvoirs relatifs aux établissements dépendant du ministère de l'Instruction publique n'ont pas encore été modifiés dans l'attente d'une réforme imminente de l'école de second cycle. Cette réforme devrait aboutir à dispenser l'enseignement secondaire dans une école pré-professionnelle unique ; les filières professionnelles et techniques seraient donc abolies et la formation professionnelle, actuellement assurée par les instituts professionnels d'Etat, serait dispensée uniquement par les Centres régionaux extra-scolaires mentionnés en b). Les avis divergent quant à l'avenir de la formation des techniciens, actuellement assurée par les instituts techniques. On se demande si cette formation (qui, après la réforme, serait dispensée après le premier cycle d'études secondaires) devrait relever de l'Etat (la proposition officielle) ou des régions (proposition avancée par les partis socialiste et communiste). Ces deux positions se fondent sur des arguments raisonnables. La solution ne sera pas trouvée sur le seul plan juridique car il est impossible de donner un sens univoque à la disposition de la Constitution ; la solution sera donc nécessairement politique.

De nouvelles réévaluations des attributions de la région et de l'Etat en matière d'éducation sont attendues. La disposition qui impartit aux régions leurs pouvoirs en matière d'enseignement professionnel et artisanal (alors que l'Etat conserve les pouvoirs relatifs au système scolaire) ne saurait être qualifiée d'heureuse car elle introduit une séparation artificielle entre l'enseignement scolaire et l'enseignement professionnel. Or s'il est impossible de donner un sens univoque à la notion d'enseignement professionnel, il est surtout néfaste de diviser l'éducation en deux sphères bien distinctes. Ces derniers temps, on a commencé à prendre conscience du danger. Il suffit de citer les études de l'OCDE et de la CEE qui évoquent la crise de l'enseignement général long, ainsi que la nécessité d'orienter davantage tout le système d'enseignement vers des activités pratiques et professionnelles afin de combattre le chômage des diplômés et des jeunes et de faciliter le passage de ces derniers de l'école à la vie active. Les instituts professionnels d'Etat (c'est-à-dire les écoles publiques qui forment les ouvriers spécialisés et les techniciens de niveau moyen) seront les victimes de cette distinction spécieuse. Bien qu'ils représentent actuellement la partie du système scolaire la moins touchée par la crise, ils sont destinés à disparaître pour faire place à une double structure : d'une part l'école secondaire supérieure d'Etat, unitaire mais non obligatoire, sans finalité professionnelle ; d'autre part, des cours régionaux de formation professionnelle. On ne peut cependant exclure qu'une telle restructuration donne quand même des résultats positifs. L'issue dépendra en grande partie des capacités d'intégration et de coordination dont sauront faire preuve l'Etat et la région. Confier aux régions les activités de la seconde catégorie pourrait être la meilleure solution à condition qu'il y ait continuité entre l'école d'Etat et l'école régionale et que les structures de l'enseignement professionnel correspondent aux besoins locaux. Or, c'est un domaine où la région devrait pouvoir faire mieux que l'Etat.

Dans l'hypothèse d'un succès, il faut donc s'attendre qu'à plus ou moins long terme l'enseignement dans son ensemble finira par relever uniquement de la région.

La troisième partie de ce rapport, qui traite de la liaison au plan régional entre l'élaboration des programmes de formation et le marché du travail, donne de plus amples informations sur l'activité des régions dans ce domaine et analyse les résultats de cette activité.

Enfin, le Décret 616 (Art. 35) de 1977 a introduit le critère suivant : la région ne peut pas créer et administrer des établissements d'enseignement qui délivrent un certificat de fin d'études secondaires, un diplôme universitaire ou de troisième cycle permettant de concourir aux emplois publics ou d'accéder à une profession libérale. Cette règle constitue une décision qui, si elle diminue l'incertitude n'a du moins pas permis de dépasser le caractère artificiel de la distinction entre les deux pouvoirs.

II. LE DISTRICT SCOLAIRE

1. ORIGINE DE L'IDEE DE DISTRICT SCOLAIRE

Le district scolaire est désormais institué par la loi ; les Conseils de districts ont été élus pour la première fois en décembre 1977. En réaction à la crise des établissements d'enseignement et à celle des rapports entre l'école et la société, trois besoins ont commencé à se faire sentir vers le début des années 70 :

a) la nécessité d'un instrument de répartition rationnelle des établissements d'enseignement sur tout la territoire (en s'inspirant de la "carte scolaire" française) ;
b) la nécessite d'un système de participation collective à la gestion de l'école et à la politique de l'enseignement ;
c) la nécessité d'une instance qui ait la responsabilité globale de l'éducation et de la culture au niveau local, au sein d'une population de dimensions optimales. En corollaire à ce besoin de responsabilité globale, cette instance devrait être extérieure à l'école pour se faire le médiateur des rapports entre la population et les établissements d'enseignement.

La synthèse de ces trois nécessités à abouti à l'élaboration d'un modèle d'instance auquel on a donné le nom de district scolaire (certains l'appellent, à plus juste titre, district éducatif).

Le principe de base était le suivant : reconnaître une large responsabilité à l'échelon local pour qu'il soit plus facile de reconstituer l'éducation en partant de la "base", en rapprochant les demandeurs de ceux qui offrent les services éducatifs ; faire en sorte que le monde de l'école et la collectivité locale, enfin intégrés, ne se dérobent plus devant les graves responsabilités et les choix inéluctables désormais nécessaires pour rétablir une harmonie entre l'école et la société.

Cette intégration ne se fera qu'en ne considérant plus l'école en tant qu'institution et unique dépositaire des problèmes de l'enseignement. En renforçant les responsabilités des collectivités locales, on devrait parvenir à atténuer la conception sectorielle et corporatiste de l'école, fruit de la gestion par l'Etat centralisateur, gestion qui prend la forme de compétences juridiques, donc délimitées de façon rigide, et non d'objectifs reconnus comme d'importance vitale et poursuivis avec sérieux jusqu'à ce qu'ils soient atteints.

Selon cette nouvelle conception, le district devrait être le moyen de garantir une formation à toute la population d'un territoire déterminé ; il devrait :

a) assurer tous les besoins en matière de formation de la population tout entière (avec une attention particulière pour les enfants soumis à la scolarité obligatoire), ces besoins devant être assurés là où ils s'expriment et conformément à leurs formes d'expression psycho-sociale et culturelle ;

b) considérer le droit aux études non pas comme le droit de rester à l'école mais comme celui d'utiliser des services et de bénéficier d'activités qui assurent la meilleure insertion possible dans le monde du travail et dans la société ;

c) établir une osmose et des échanges entre l'école et le travail, tant pour les élèves que pour les enseignants.

Dans cette perspective, le district devient nécessaire, non seulement pour faire participer les groupes locaux à la gestion de l'école, non seulement pour libérer des énergies novatrices, mais surtout en tant que fonction sociale d'un type nouveau et en tant que structure locale qui permet d'associer tous les individus, à commencer par ceux qui ont quitté l'école et auxquels l'école ne s'intéresse pas ; ceux qui ont quitté avant la fin de la scolarité obligatoire ; les titulaires d'un certificat de fin d'études secondaires qui sont en chômage au sortir de l'école et qui auraient besoin d'une adaptation au travail ; les adolescents qui ont abandonné avant d'avoir obtenu une qualification professionnelle - autant de catégories qui font apparaître la nécessité d'une éducation permanente.

Au plan local, cette structure peut alors englober toute la population et favoriser ce dynamisme des échanges, dépasser ce corporatisme auquel nous avons déjà fait allusion, et jeter ainsi les bases non pas d'une école nouvelle mais d'une "société éducative" nouvelle. L'une des missions décisives de cette nouvelle unité territoriale de planification et d'intervention sociale est donc d'amener progressivement le district à assumer la responsabilité de la jonction entre l'éducation et l'emploi.

2. DE L'IDEE A LA REALITE : L'ORIGINALITE DU DISTRICT

L'"utopie" des partisans du district n'a pu être que partiellement entérinée par la loi car le district avait été considéré comme un mythe, comme une sorte d'instrument magique. Il a donc été ramené à de plus justes proportions, comme nous le verrons ci-dessous. Il faut reconnaître pourtant que lorsqu'il a voté la création du district, le Parlement a réussi à trouver la quadrature du cercle. Le district représente, en effet, une institution juridique fort originale :

a) c'est une autorité territoriale (qui s'exerce sur une population et sur une zone données et non pas sur une institution), exclusivement élue par la collectivité locale qui tire son pouvoir de la base, et c'est une autorité autonome par rapport à l'administration de l'Etat :

b) le district exerce son pouvoir au sein de l'appareil d'une administration d'Etat, l'enseignement, et vis-à-vis d'un système éducatif qui demeure étatique ;

c) enfin, il se distingue de l'autorité politique locale (municipalités, provinces) car c'est une autorité sectorielle.

3. CARACTERISTIQUES DU DISTRICT SCOLAIRE INSTITUE PAR LE DECRET PRESIDENTIEL N° 416 DU 31 MAI 1974

Le décret n° 416 du 31 mai 1974, en application de la loi n° 477 du 30 juillet 1973 portant délégation de pouvoirs, a créé cette nouvelle circonscription administrative, le district scolaire, dans le cadre duquel doit être assurée la présence d'écoles de tous genres et de tous niveaux (à l'exception des universités).

a) Mission. La loi stipule que :
"Le district scolaire réalise la participation démocratique des collectivités locales et des forces sociales à la vie de l'école et à sa gestion, dans les formes et modalités prévues par les articles ci-après. Il a pour mission de renforcer et de développer les établissements scolaires et éducatifs, les activités annexes et, ce faisant, il vise au plein exercice du droit aux études, au développement culturel de la collectivité locale, enfin au meilleur fonctionnement des services scolaires."

b) Champ d'action territoriale. La subdivision du territoire des régions en districts est décidée par le ministre, sur la proposition des régions, en fonction des critères suivants : le district scolaire ne peut avoir une étendue supérieure à celle de la province ; il doit correspondre à une aire territoriale dont la population est comprise entre 100.000 et 200.000 habitants, cette aire étant définie en tenant compte des caractéristiques sociales, économiques et culturelles de la zone ainsi que des infrastructures, des services sanitaires, des communications et des transports.

c) Nature juridique. Le district est administrativement autonome et se charge directement de la gestion des fonds nécessaires à son fonctionnement.

d) Organes et éléments sociaux qui y participent. A la tête du district se trouve un organe collégial, le Conseil scolaire de district, représenté par le président du Conseil scolaire de district. Le Conseil scolaire de district est composé de trois représentants du personnel de direction ; de cinq enseignants représentant les titulaires et les auxiliaires ; de deux représentants du personnel non enseignant ; d'un représentant des écoles assimilées et des écoles privées reconnues par l'ETAT ; de sept représentants des parents ; de sept représentants des élèves ; de trois membres désignés par les syndicats de travailleurs salariés ; de deux représentants des travailleurs indépendants ; de trois représentants des intérêts généraux (un est désigné parmi les chefs d'entreprise par la Chambre de commerce et les deux autres sont désignés par le Conseil provincial parmi les associations culturelles) ; de trois représentants de l'administration provinciale, dont un appartient à la minorité ; enfin, de sept représentants de la municipalité dont deux appartiennent à la minorité. Les membres électifs sont élus au mode de scrutin proportionnel sur la base de listes de candidats. Le Conseil élit son président en son sein.

e) Pouvoirs et fonctions. Le Conseil élabore tous les ans un programme relatif :

- aux activités para-scolaires, extra-scolaires et inter-scolaires pour l'année suivante ;
- aux actions d'orientation scolaire et professionnelle ainsi que d'aide scolaire ;
- aux services de médecine scolaire ;
- aux cours pour adultes ;
- à l'extension des activités culturelles et sportives des élèves ;
- aux activités expérimentales.

En outre, le Conseil formule des propositions relatives à la création, à la localisation et à l'extension des établissements scolaires et des structures qui s'y rapportent afin de constituer des unités scolaires territorialement et socialement intégrées et d'assurer la présence, dans chaque district, d'écoles de l'Etat de tous genres et de tous niveaux.

D'autre part, le Conseil transmet au ministère de l'Instruction publique des propositions relatives à l'insertion dans les programmes scolaires d'études et de recherches utiles à une meilleure connaissance des réalités locales ; il propose aussi aux autorités compétentes une meilleure utilisation du personnel des écoles, tout en respectant les conditions prévues par la loi.

4. MODALITES DU PARTAGE DU TERRITOIRE REGIONAL EN DISTRICTS SCOLAIRES

C'est à la région que la loi a confié la division du territoire en districts scolaires. Le tableau 5 présente les données relatives au nombre de districts et à leurs dimensions moyennes :

- le territoire national est composé de 760 districts ;
- le district présente les caractéristiques moyennes suivantes : une population de 73.000 habitants ; une superficie de 378 km^2 ; une population scolaire de 15.000 élèves ;
- il y a en moyenne 8 districts par province.

Les régions ont été libres de suivre une méthode et une procédure très souples :

- Aucune d'elles n'a appliqué rigoureusement un modèle mathématique, même si beaucoup ont essayé de le faire ;
- Certaines ont toutefois appliqué une méthode unique pour tout le territoire régional. Cette méthode se fondait sur l'application d'analyses techniques du territoire, corrigée par des considérations empiriques qui tenaient compte de paramètres politiques ou administratifs locaux. Le cas le plus significatif d'application d'une procédure technique centrale est celui de la région des Pouilles(1) ;
- D'autres ont suivi la méthode inverse, en partant de la consultation des collectivités locales sans hypothèse de départ. La région lombarde offre le meilleur exemple de cette démarche.(2)

La constitution des districts scolaires qui, pendant près de deux ans, a mobilisé les municipalités, les écoles et les forces sociales locales, a suscité une prise de conscience et un débat dans tout le pays sur les rapports entre l'école et la société et entre l'école et le territoire.

En analysant après coup les critères qui ont prévalu dans la subdivision du territoire en districts, on note que :

a) au sujet des dimensions :

i) la dimension minimale dont on est parti est celle du nombre minimal d'habitants fournissant une population scolaire qu'englobe une école secondaire de second cycle (soit 1.500 élèves) sur le modèle suédois ;

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1) CSATA, Ipotesi del territorio regionale in distretti scolastici, Bari 1975, pp.80 et suivantes.

2) "I distretti scolastici in Lombardia", Quaderno della Regione Lombardia, Milan 1976, pp.13 et suivantes.

Tableau 5

CARACTERISTIQUES DES DISTRICTS

Régions	Nombre de districts	Population moyenne par district	Superficie moyenne du district en km^2	Nombre d'élèves par district	Nombre de districts par province
Piemont	76	59.754	334,20	10.487	12,7
Val d'Aoste	2	56.860	1.631,13	10.551	2,0
Lombardie	118	74.895	202,12	15.061	13,1
Vénétie	59	72.500	311,28	15.366	8,4
Frioul Venezia Giulia	18	69.142	435,82	12.448	4,5
Ligurie	21	88.923	257,79	15.060	5,3
Emilie-Romagne	47	83.741	470,70	15.095	5,9
Toscane	52	68.592	442,15	12.445	5,8
Ombrie	12	66.268	704,67	12.357	6,0
Marches	18	77.244	538,53	15.026	4,5
Latium	59	83.421	291,57	18.270	11,8
Abruzzes	14	86.523	771,01	17.875	3,5
Molise	7	47.101	633,95	9.499	3,5
Campanie	62	85.166	219,28	20.529	12,4
Pouilles	51	73.948	379,35	17.289	10,2
Basilicate	10	61.460	999,23	14.429	5,0
Calabre	38	53.538	396,85	12.786	12,7
Sicile	65	74.788	395,51	15.941	7,2
Sardaigne	31	50.089	777,09	11.950	7.8
Total	760				
Moyenne		72.563	378,22	15.005	8.3

Source : CENSIS.

ii) à mesure que s'étendaient les consultations, ce critère a été progressivement considéré comme secondaire par rapport à la nécessité de faire coïncider le district avec la collectivité locale intégrée "naturelle" et avec le critère de la facilité d'accès au centre scolaire du district (dans le cas de districts avec un seul centre scolaire comprenant une école secondaire de second cycle) à partir de tous les points de la zone (ce critère prévalait surtout dans les régions de montagne);

iii) quant aux dimensions maximales, ce sont les villes de 150.000 à 250.000 habitants qui ont présenté des situations critiques et l'on a opté pour des solutions différentes, tantôt le respect de l'unité de la ville, tantôt sa subdivision en deux afin de permettre une meilleure participation ;

iv) on a tenu compte aussi de la nécessité de faire coïncider le périmètre du district avec celui des autres circonscriptions administratives (unité des services sanitaires et sociaux, arrondissements des grandes villes, zones soumises à des travaux publics d'aménagement).

b) au sujet de l'implantation des écoles et de la subdivision du territoire

i) à l'extérieur des grandes villes, on a pris en considération les zones d'attraction, en appliquant une méthode bien connue d'analyse de l'espace pour délimiter les zones dans lesquelles les échanges atteignent le maximum d'intensité. Dans tous les cas, l'analyse s'est fondée sur les zones d'attraction des élèves de l'école secondaire de second cycle ;

ii) cette première méthode s'est souvent révélée correcte en ce qui concerne le développement de l'urbanisme et de l'économie. En maintes occasions, le district anticipe sur l'avenir en prévoyant la création d'écoles là où il n'en existe pas. Tel a été le cas dans la banlieue de grandes villes où l'on a décidé de décongestionner celles-ci en plaçant à l'extérieur des centres scolaires relevant du district afin d'amorcer un mouvement centrifuge du domicile vers l'école, à l'inverse du trafic urbain normal.

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III. ROLE DES REGIONS DANS LA PLANIFICATION DE LA FORMATION PROFESSIONNELLE EN FONCTION DU MARCHE DU TRAVAIL ET DE L'ECONOMIE DE LA REGION

1. LA SITUATION ACTUELLE

L'innovation que constitue, sur le plan institutionnel et politique, la création de la région suscite la question de savoir ce qu'a donné cette restructuration ; il faudra attendre quelque temps encore avant de pouvoir y répondre. La situation actuelle peut être résumée ainsi :

- depuis cinq ans a lieu une période d'évaluation et d'expérimentation : ce n'est qu'en 1976/77 que les régions ont commencé à formuler une politique originale ; certaines d'entre elles (Lombardie, Toscane, Marches, Campanie) ont voté des lois organiques qui réglementent ce secteur. Il est donc juste d'attendre quelque temps avant de juger de la signification de cette nouvelle phase ;
- d'autre part, les régions ont reçu de l'Etat un appareil éducatif (enseignants, établissements, organismes de gestion publics et privés) auquel elles ne peuvent apporter que des modifications mineures. En effet, à l'exception de quelques régions, l'ampleur des activités de formation professionnelle n'a pas beaucoup augmenté ; le transfert du système ne correspondait pas à une période d'expansion de la demande de formation car on avait déjà atteint un niveau quantitatif supérieur aux besoins (bien souvent au détriment de la qualité).

En conclusion, on peut dire que des perspectives d'innovation s'ouvrent aux régions, mais avec certaines réserves.

Une seconde raison interdit de faire dès maintenant un bilan de l'expérience. En effet, des réformes majeures sont en cours quant à l'organisation future des structures régionales de l'enseignement.

- l'imminente loi-cadre nationale sur la formation professionnelle, c'est-à-dire la loi d'Etat qui dicte les principes généraux selon lesquels, aux termes de l'article 117 de la Constitution, la région exerce sa capacité de légiférer ;
- La réforme imminente de l'école secondaire de second cycle ;
- la loi récente (mai 1977) sur l'emploi des jeunes ;
- la création récente des districts scolaires ;
- le décret n° 616 du 24 juillet 1977 parachevant le transfert des pouvoirs de l'Etat aux régions.

L'examen des activités de formation professionnelle exercées jusqu'à présent par les régions(1) ainsi que les entretiens conduits au niveau des services régionaux nous apprennent qu'en vue d'améliorer la liaison avec le marché du travail, la région a créé une entité politique locale chargée d'identifier les besoins régionaux et de contrôler le caractère fonctionnel des programmes de formation ; toutefois elle n'est pas parvenue à améliorer la qualité de la planification des relations entre l'offre et la demande de formation.

On a pu noter, à l'occasion des recherches effectuées pour préparer le présent rapport, qu'aucune région n'a prétendu que les activités de formation aient été programmées à la suite d'une analyse satisfaisante de la demande d'emploi et des perspectives de développement régional. Toutefois, les régions ont commencé à voter des lois et à approuver des textes qui prévoient des mécanismes et des procédures techniques et politiques dans cette perspective.

Nous allons examiner les trois cas les plus intéressants de ce point de vue, à savoir la Toscane, la Vénétie et la Lombardie.

2. MODELES ET INSTRUMENTS QUI SERONT UTILISES

a) Le cas de la Toscane est doublement caractéristique ; en effet, c'est l'unique région qui tente de définir sur son territoire une liaison organique entre les orientations du développement économique contenues dans le plan régional et le plan de formation professionnelle. Pour l'Italie, c'est là une expérience nouvelle :

- elle utilise la décentralisation (plans spécifiques à différentes zones pour la formation) afin de connaître les besoins et d'opérer les choix ;
- la nouvelle méthode est appliquée dans le plan triennal 1977-80 lui-même subdivisé en plans annuels. La Toscane a délégué l'administration de la formation professionnelle à ses neuf provinces ou à l'association éventuellement constituée entre la province et les municipalités dont le territoire correspond à un district scolaire (en vue de promouvoir cette forme de gestion, la loi accorde une augmentation de 10 % des moyens de financement).

Le mécanisme de planification fonctionne suivant le schéma suivant :

- La région établit un plan contenant les objectifs généraux de la formation professionnelle ainsi que les directives concernant chaque secteur de l'économie(2) ;

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1) L'Istituto per lo Sviluppo della Formazione Professionale dei Lavoratori (ISFOL) a effectué une enquête empirique exhaustive présentée dans le rapport "L'attività regionale di formazione professionale", Rome, 1976.

2) Pour les trois années 1977-80, le plan a été approuvé par délibération du Conseil régional, no. 374 en date du 1er juin 1976.

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- Ces directives sont articulées en fonction des zones économico-urbaines (c'est-à-dire en fonction d'instruments d'analyse et de planification socio-économiques). Pour chaque zone les secteurs économiques prioritaires (tourisme, services, industrie ou artisanat, etc.) sont mentionnés ;
- Les provinces élaborent un projet économique d'intervention indiquant, en ce qui concerne les objectifs de la formation :
  i) les résultats spécifiques que l'on veut atteindre en matière d'offre de main-d'oeuvre qualifiée en fonction des directives de développement des zones économiques qui constituent le territoire provincial (la Toscane est divisée en 32 zones économiques) ;
  ii) les établissements d'enseignement et les activités de formation (centres, types de cours, nombre d'élèves) de chaque district scolaire, compte tenu des flux de sortie de l'école obligatoire.

Comme on peut le constater, il s'agit là d'un mécanisme complexe qui constitue pourtant une simplification et une meilleure adaptation à la réalité puisque sont action s'exerce surtout au niveau local. A ce niveau, les deux pôles complémentaires de référence (entrée et sortie) sont le district scolaire (entrée) et la zone économique (sortie).

Les premiers résultats de ce système sont incontestablement positifs par rapport au système antérieur. Le mécanisme d'analyse, de contrôle et de proposition, introduit au niveau local, a permis :

- de rationaliser la répartition géographique des activités de formation professionnelle ; elle a réussi la tâche difficile de faire mettre fin à des cours de formation professionnelle qui ne correspondaient plus aux possibilités d'emploi locales ;
- de "trouver" et de développer des activités de formation susceptibles de valoriser les métiers les plus originaux des différentes zones économiques, tels que, entre autres, le tissage selon des techniques spéciales, l'industrie du cuir, du verre, l'artisanat d'art (orfèvrerie, fer forgé, etc.) ; tous ces métiers étaient exclus des programmes de formation professionnelle du système antérieur ;
- d'associer les représentants des intérêts locaux au contrôle de la qualité des activités de formation ; dans le système précédent, ce contrôle, essentiellement de caractère administratif, relevait des autorités centrales.

b) La Lombardie entend procéder de manière analogue mais, pour le moment, elle constate avec réalisme qu'elle ne peut encore se fier à un plan de développement économique de son territoire.(1)

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1) "Documenti di lavoro per il piano regionale della formazione professionale, 1977-78", Milan, 1977.

Elle tente de résoudre le problème en se désaisissant de ses prérogatives de choix et de médiation en faveur des responsables locaux ; ces derniers disposent d'un organisme technique d'analyse du marché du travail (CITE), commun à plusieurs districts.

La participation des organismes locaux à l'élaboration des propositions est encore plus décentralisée qu'en Toscane. Les propositions sont faites par le Conseil de district ; de cette manière s'établit une jonction satisfaisante entre les attributions de la région et celles de l'Etat en matière d'éducation.

c) La Vénétie, quant à elle, n'a pas encore de loi propre sur les mécanismes de planification mais, plus que toute autre, cette région met au point des instruments techniques d'analyse du marché du travail et de la demande de formation (du type de ceux qui sont élaborés, en France, par le CEREQ). Deux grandes lignes directrices président à ces travaux :

- l'une, d'ordre quantitatif, cherche à utiliser, à améliorer et à décentraliser les sources de données préexistantes et à créer un flux permanent d'informations statistiques couvrant tous les aspects du marché du travail, pour en étudier les tendances et faire des projections et des prévisions ;
- l'autre est l'analyse qualitative et quantitative de la nouvelle demande de formation, effectuée à partir d'enquêtes sur le terrain.

Summary of Technical Report No. 12

REGIONALISATION OF EDUCATION IN ITALY

by

L. Pescia

CENSIS, Rome

I. THE REGION

Although Italy - because of its history, geographical dimensions, regional dialects and awareness, regional organisation of social services, etc. - might well be described as a regionalist or federal State, yet education has remained until recently under the control of the central government. However in 1973/74, two important processes of decentralisation took place; one to give more autonomy to the regions, the other to create new regional bodies to organise and administer certain sectors of public education. The regions now possess legislative powers in many fields, while performance of jobs is necessarily delegated to the appropriate bodies in the provinces and municipalities within the regions. Though subsidised by the State, the regions are financially independent and may even levy taxes. In the field of education, much new power has been granted to the regions, school-aid being an interesting example. School-aid designates those social services which help to finance school transport and school meals, and which provide scholarships and book-purchase schemes for children coming from low-income families. The regions delegate school-aid responsibilities to the municipalities, during the period of compulsory schooling, and to the provinces, during the period of voluntary schooling.

Despite difficulties in interpreting the legal jurisdiction of State and region, in the matter of vocational education, for example, where it seems that the State Professional Institutes will still remain under State jurisdiction, many advantages can already be seen to be accruing from regional intervention:

- larger sums of money are being devoted to school aid;
- the equalisation system of financing regional projects by the State is working very well: much more money is being spent in the poorer southern regions where the school failure or drop-out rate is highest;

- more efficient utilisation of funds to meet the specific educational and social needs of the regions has been made possible;
- much greater participation by parents and local teachers in school affairs has developed;
- many more educational activities, complementary to the official school programmes, are being organised.

By the end of 1977 it is hoped that the newly constituted School-district Boards with precisely defined powers and having representatives from the municipalities and provinces will be delegated powers in education matters by regional governments.

II. THE SCHOOL DISTRICT

The concept of the school district - the occasion of a vast national debate during the early 1970s - is based on the recognition of three outstanding needs:

- the need to have educational institutions rationally distributed throughout the entire country;
- the need to have collective participation in school policy and management;
- the need for an organisation which would assume responsibility for education and culture at local level among a population of optimum size. By creating school districts it is hoped to meet these needs and to provide for the educational requirements of local population, both adults and children. The right to education is to be considered not just as the right to stay at school but the right to use all educational services available so that the school or educational institute will become a real part of society and be integrated into the world of work. As a concept, the school district is an original one in Italy, being a territorial and elected authority, as distinct from other public authorities. It is autonomous vis-à-vis the State while at the same time being part of the State education system.

The characteristics of the school district: the Decrees of July 1973 and May 1974 lay down the chief characteristics of the school district with regard to:

- its purpose;
- the area (not larger than a province) and population (between 100,000 and 200,000 inhabitants) over which the district has jurisdiction;

- the composition of the School-district Board and how it was elected for the first time in December 1977;
- its powers and function (a large list).

The division of the regions into school districts: the regions have already been divided into school districts (760) and Table 5 gives their average size, population and school population. Some attempts were made to draw up district limits according to a mathematical model but empirical criteria and consultation with the local population always decided the question in the end. Minimum and maximum population figures were taken into account, as was the necessity of having the district coincide insofar as possible with other administrative boundaries. Account was also taken of present and future growth centres and also of the need to relieve population congestion in the city centres.

III. REGIONAL INTERVENTION IN VOCATIONAL/PROFESSIONAL TRAINING AS A FUNCTION OF THE LABOUR MARKET AND THE ECONOMY OF THE REGION

It is difficult for the moment to say how effective this intervention has been because of the recent nature of regionalisation policy in Italy and because major structural reforms in education - such as the reform of vocational training, of the "upper cycle" in secondary schools, etc. - are at the moment being implemented. It can be said however that no region has yet produced a satisfactory analysis of employment needs and the economic trend of the region. It must, though, be pointed out that many regions - Tuscany, Venetia, Lombardy may be cited - are already preparing seriously for such an undertaking. Tuscany, for example, is attempting to forge an organic link between the vocational training programme and the management of economic development in the region, and this not just in general for the whole region, but specifically for the different provinces (nine in number) and economic zones (thirty-two in number). It is in this way hoped to know exactly how much skilled labour will be available and the types of skilled labour needed to meet future economic demands. In short, Tuscany is attempting to put in close contact, at the local level, two important components of the social system, namely, the school district, concerned with numbers of students, different courses, types of training, training centres, etc., and the economic zone concerned with effective and profitable employment of school-leavers.